

# Calendar Year 2008 Louisiana TravelsAmerica Visitor Profile Report

**November 2009**

205301



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# Introduction and Purposes of the Research

**TNS is pleased to present this TravelsAmerica report for the Louisiana Office of Tourism. TNS conducts this online (data collection) project continuously throughout the year as a nationwide syndication. The results enable the assessment of visitor volumes and development of profiles of leisure visitors to the state.**

**As a tracking study, TNS and the Louisiana Office of Tourism constantly strive to improve the research. This report assesses the total volume of visitors to Louisiana plus those arriving from three key areas. The profile of Louisiana's visitors encompasses:**

- Volume and source of visitors
- Basic demographics such as age, number of children in household, household income
- Trip characteristics such as day vs. overnight, business travel, travel expenditures, length of stay, activities selected, travel timing (quarter), mode of transportation
- Visitor residence by state and DMA



# Introduction and Purposes of the Research – (con't)

- Specific segments of visitors:
  - In-state residents
  - High BDI Marketing Area residents (Above average number of visitors from DMA; see appendix)
  - Residents living elsewhere (neither in-state nor in the High BDI Marketing Area)
  - African-Americans
  - Hispanics
  - Mature visitors (defined as those 55+)
- Satisfaction with Louisiana as a destination
- An Export/Import assessment of spending by Louisiana residents traveling elsewhere vs. non-Louisiana residents visiting Louisiana
- Competitive destination comparisons to Louisiana.

**The report continues with the Executive Summary followed by the Results of the Research section, which includes detailed tables and graphics of findings. The appendix contains a description of the Business Development Index by DMA, the research methods, and a glossary of terms.**



# Executive Summary/Implications

## Background

**Derived from the TNS TravelsAmerica syndication, this second annual report prepared for Louisiana Office of Tourism for Calendar Year 2008 (January 1, 2008 through December 31, 2008) addresses:**

- The total Louisiana market and these subgroups:
  - Louisiana residents
  - The High BDI Marketing Area
  - Those who reside elsewhere (neither Louisiana nor the High BDI Marketing Area)
- Volume of visitors and top Louisiana cities visited
- Volume of visitors by quarter
- Relevance of key segments and impact of the African-American market
- Source of visitors
- Louisiana visitor profile, including special segments: African-American, Hispanic, and Mature markets
- The Louisiana trip (purpose, stay length, companions, mode, timing, planning, activities, spending, and satisfaction)
- Competitive states – how they compare to Louisiana
- Tourism export/import “balance of trade” assessment.



# Executive Summary/Implications

## Importance of Tourism to Louisiana

**Several measures underscore the importance of tourism to Louisiana:**

- **Overnight Volume.** Despite declining visitor volume, more Louisiana visitors are staying overnight (70% vs. 67%), at parity with other US travelers. The average length of stay hovers near three nights, similar to other nearby states (although it lags Florida's 4.6 nights). And 43% of overnight visitors stay in paid accommodations (hotel/motel/B&B).
- **Travel Spending in Louisiana (excluding transportation).** With more overnight stays, Louisiana visitor spending rises in 2008 (\$465 vs. \$412). Further, it surpasses all competitive states with the exception of Florida (\$817).
- **Balance of Trade.** The volume and spending level for Louisiana enables it to maintain a "surplus." Exports (travel dollars coming into Louisiana from non-residents) soften but continue to substantially exceed imports (Louisiana residents who spend travel dollars outside Louisiana). In addition, many domestic travel dollars remain in the state (Louisiana residents traveling locally). Exports = 53%; Imports = 38%; Domestic = 10%.

# Executive Summary/Implications

## Importance of Tourism to Louisiana – (con't)

### Several measures underscore the importance of tourism to Louisiana:

- **Source of Visitors.** Corresponding with greater revenue, more Louisiana visitors come from other states (64% arrive from out of state; 36% from the High BDI Marketing Area and 28% from elsewhere).
- **Trip Purpose.** Leisure travel (74%) continues to be a greater source of visitation than business travel (15%) and personal business/other (12%). Leisure travel is primarily comprised of visiting friends/relatives (39%), followed by entertainment (15%), outdoor recreation (4%), and other personal pleasure (16%).
- **Timing.** While national travel peaks in summer 2008, Louisiana's greatest visitation occurs in the spring months. This is a change from previous years when 4Q was typically the strongest for Louisiana. However, 4Q 2008 was the weakest for Louisiana and the US as a whole, impacted by the financial banking crisis.
- **Business Travel.** Business travel behaviors/choices differ from leisure travelers. While they represent fewer trips (15% vs. 74% strictly leisure), they are more likely to fly (48% vs. 12%), stay longer (3.7 vs. 3.0 nights), more often pay (hotel/motel) for lodging (2.9 vs. 0.9 nights), and are more likely to travel alone (69% vs. 20%).

# Executive Summary/Implications

## Profile: Trip and Travel Characteristics

- **Demographics.** Louisiana Visitors Generally Mirror Total US Travelers, With Some Variations (LA vs. Total US):
  - Age shows minor differences (45 vs. 46).
  - Louisiana visitors' income falls just below the average (\$66,100 vs. \$69,400), driven in large part by Louisiana residents' income (\$55,000).
  - Family composition factors indicate slightly fewer married couples (58% vs. 61%), but similar household sizes and families (children in the home – 36% vs. 36%).
  - Ethnic origins indicate that slightly more than twice as many Louisiana visitors (16%) claim African-American heritage than in the US as a whole (7%). However, Hispanic levels match (4%).
  - Attitudes, as defined by TNS FutureView, show that Shapers/Makers (influencers) comprise about the same proportion of visitors to Louisiana as to the US as a whole (32% vs. 31%).
  - Retirees represent a similar proportion (17% vs. 16%).
  - Slightly fewer are formally educated (40% vs. 43% college graduates).
  - In-State visitors differ from other visitors. They tend to be younger (43), less affluent (\$55,000), more likely to have children (39%), and less likely to be 4 year college graduates (35%).



# Executive Summary/Implications

## Profile: Trip and Travel Characteristics – (con't)

- **Travel Planning Horizons Remain Short, But Vary by Distance.** About half (48%) of Louisiana visitors decide to take the trip relatively spontaneously (within two weeks of departure), but the spontaneity declines with increasing distance (and travel time): in-state (67%), High BDI Marketing Area (48%), elsewhere (31%). Mature visitors (45%) are also somewhat less likely to make a last minute decision.
- **Travelers Primarily Rely on “Experience” for Information.** Similar to other travelers, past experience (30%) and word of mouth (19%) are the greatest sources of information when planning a trip. The Internet is a popular place to gather information (23% vs. 26%), but destination websites are currently used by just 1 in 10 travelers. Printed information (3%) has minimal reach and impact.
- **Louisiana Visitors Book “Offline” More Often Than Others.** While US travelers rely primarily on online trip booking (50% online vs. 39% offline), Louisiana visitors are more evenly split (46% vs. 44% respectively). This suggests Louisiana visitors may not be as Internet-savvy or they more often appreciate the “human touch.”
- **Most Visitors Drive.** Three-quarters of visitors drive to Louisiana (74% vs. 72% all US). The proportion, as expected, declines with distance: residents (92%), High BDI Marketing Area (78%), and elsewhere (43%).
- **Overnighters Spend More.** Not surprisingly, because of the additional time spent in the state and because they incur lodging expenses (averaging 3.0 nights), Overnight visitors spend four times as much as day trip visitors (\$663 vs. \$165), a gap even larger than last year (\$614 vs. \$188).

# Executive Summary/Implications

## Diverse Characteristics Appear in Ethnic/Age Segments

**Given differing travel habits and motivations, marketing messages can be tailored to increase relevance for key target groups. Three separate markets covered by this report include (comparisons shown below are the segment vs. all Louisiana visitors):**

### ■ African-American Visitors:

- **Demographics:** This group comprises one sixth (16%) of all Louisiana visitors, is younger (37 vs. 45), less affluent (\$54,900 vs. \$66,100), less often married (41% vs. 58% -- contributing to lower reported incomes), and more often (50% vs. 36%) live with children. Most likely segment to be employed full-time (54% vs. 41%) – consistent with their youth.
- **Travel Patterns:** More than half travel to visit friends and relatives (52% vs. 39%). Consequently, they represent a less profitable niche. While they stay overnight as often (71% vs. 70%) as other Louisiana visitors, they stay fewer nights (2.8 vs. 3.1) and are more likely to stay with friends or relatives (50% vs. 38%). Their average spending (\$462 vs. \$546) is lower than any other segment except in-state visitors (\$217).
- **Activity Choices:** African-Americans, by far, more often enjoy nightclubs/dancing (17% vs. 10%).

# Executive Summary/Implications

## Diverse Characteristics Appear in Ethnic/Age Segments – (con't)

### ■ Hispanic Visitors:

- Demographics: The smallest of the key segments (4% of Louisiana visitors) and, consequently (caution to reader), reflect a small sample size (n=30). This group matches the total sample on age (45) but lags lightly in affluence (\$60,500 vs. \$66,100). They tend to live in larger (3+) households (55% vs. 42%), but fewer have children at home (29% vs. 36%).
- Travel Patterns: They take most trips to see friends/relatives (40% vs. 39%) or for entertainment and sightseeing (19% vs. 15%). They represent a very profitable niche (*caution; small base size*) as they more likely stay overnight (79% vs. 71%) and stay longer (3.7 vs. 3.1 nights); however, they split time between hotels (45% vs. 50%) and private homes (45% vs. 38%). They also spend above average (\$752 vs. \$546).
- Activity Choices: More often choose shopping (29% vs. 18%), casinos/gaming (27% vs. 16%), fine dining (17% vs. 13%), and nightclubs/dancing (18% vs. 10%).

### ■ Mature Visitors:

- Demographics: Representing over a quarter (28%) of Louisiana visitors, this group, by definition, is older (64 vs. 45), has average income (\$66,200 vs. \$66,100), and is more likely Caucasian (93% vs. 81%). As expected, they represent more retirees (38% vs. 12%), but fewer are retired than in 2007 (38% vs. 51%), perhaps a reflection of the economy forcing people to work longer.
- Travel Patterns: This group is equally likely to spend the night (72% vs. 71%), but tend to stay longer (4.0 vs. 3.1 nights), and pay for lodging more often (47% vs. 42%). Spending slightly exceeds average levels (\$566 vs. \$546).
- Activity Choices: More often gamble (24% vs. 16%).



# Executive Summary/Implications

## Competition Fiercest In, But Not Limited To, The South

- **Southerners Stay in the South, but Are Willing to Travel Beyond.** Not surprisingly, particularly in the current market, proximity continues to play a substantial role in destination choices. The top six destinations chosen by Louisiana visitors are all southern states (TX, FL, MS, AL, TN, GA); however, California, Nevada, and New York all make the top twelve. Top cities (DMAs) visited reflect a very different pattern; New Orleans leads, but non-Southern areas follow: New York City, Las Vegas, Chicago, and Dallas.

## Louisiana Generates High Level of Satisfaction

- **Across Geography and Segment, at least 8 in 10 are Satisfied with Louisiana.** Louisiana visitors rate the state highly, with those living in-state (87% extremely/ very satisfied) assigning higher “marks” than High BDI Marketing Area (81%) or other visitors (82%).



# Executive Summary/Implications

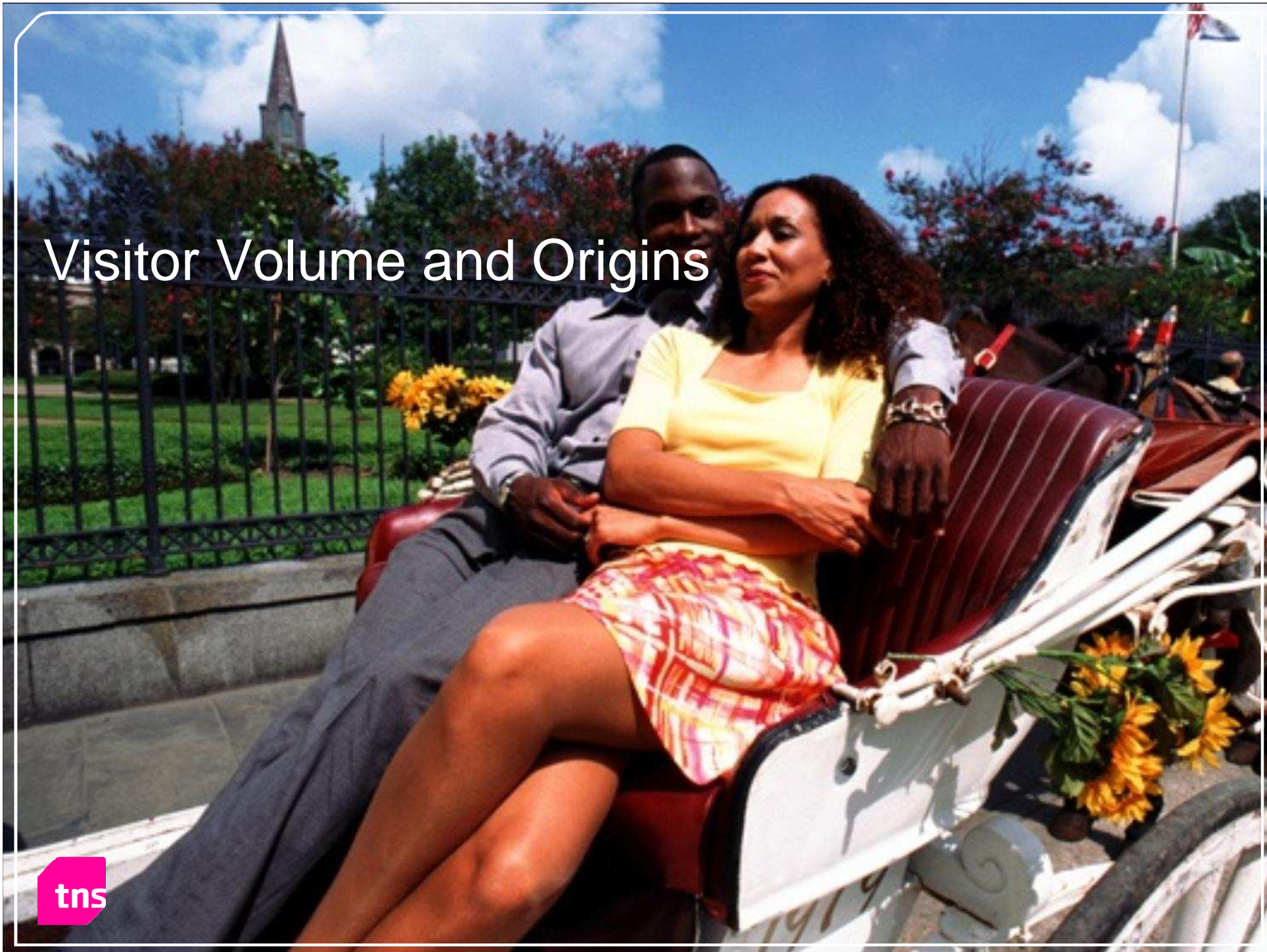
## Assessment

- **Word of Mouth and Past Experience are Key to Future Growth.** Recommendations from friends and family, along with past experience are the most important sources of information about destinations, and can be difficult to control. Louisiana already enjoys strong satisfaction among visitors and needs to maintain this. Further, use of social media tools could help Louisiana “spread the word” among family and friends.
- **Local Tourism and Specialty Markets are Important, but Those Traveling Greater Distances Should Not be Ignored.** A quarter of Louisiana visitors (28%) come from outside of the state and the High BDI marketing area. These people stay longer, pay for lodging, take advantage of more “tourist” activities, and as a result spend nearly twice as much as the average visitor.

# Results of the Research



# Visitor Volume and Origins

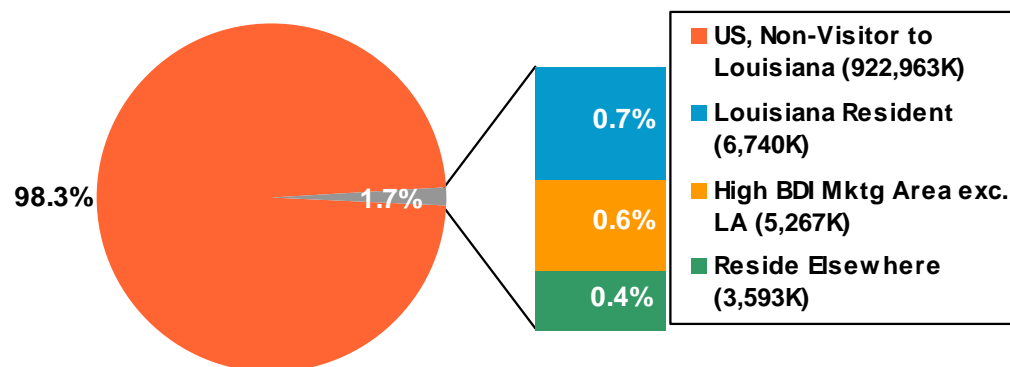


# Overall Volume of Visitors to Louisiana, Person-Trips

## Market Overview (Person Trips)

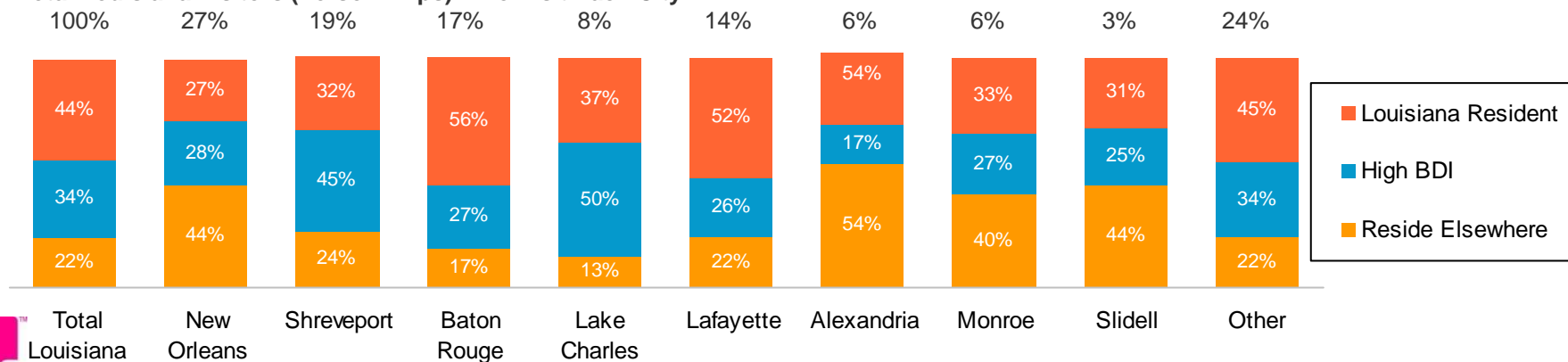
- Louisiana continues to draw most visitors from those most familiar with it – in-state residents and the High BDI Marketing Area.
- New Orleans remains the most popular city and draws most of its visitors from the rest of the country (44%), although total visitation softens (27% vs. 33%) since 2007.

Projected Visitation – All US Trips (938,563,000)  
Projected Visitation – All Louisiana Trips (15,600,000)



**Louisiana Cities Visited by Residence**  
(% of All Louisiana Visitors; Multiple Cities Allowed)

% of Total Louisiana Visitors (Person-Trips) Who Visit Each City:



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Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

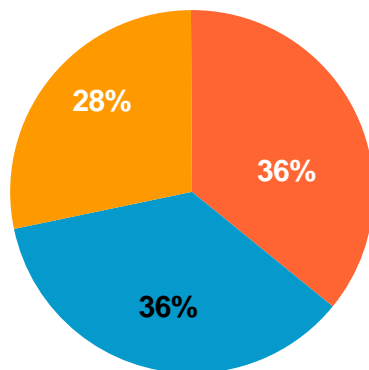
# Key Segments

## Market Relevance

- Out of 210 DMA areas, Louisiana hosts an above average number of visitors from 28 of those outside of Louisiana (Louisiana's High BDI Marketing Area, shown later).
- The greatest proportion of travel parties live in the state (36%) or the High BDI Marketing area (36%). This reflects a slight shift from 2007, with a growing proportion of in-state visitors (36% vs. 32%).
- The bulk of Louisiana visitors (45%) fall in the 35-54 age category, with just over one-quarter in each of the younger (under 35) and mature (55+) groups.
- By ethnicity, Louisiana hosts more than double the US average of African-Americans (16% vs. 7%), but the majority of visitors are white (76%).

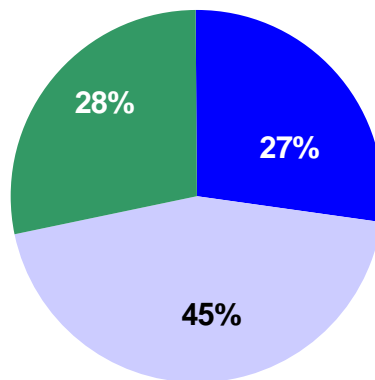
Proportion of Louisiana Visitors by Segment

By Source



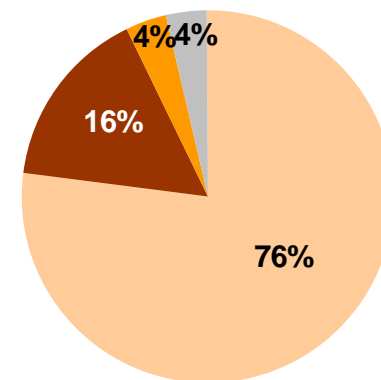
■ Louisiana ■ High BDI ■ Elsewhere

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA\* ■ Hispanic ■ Other

\* African-American

**Caution: Note Small Sample (30) for Hispanic yields less reliable comparisons**



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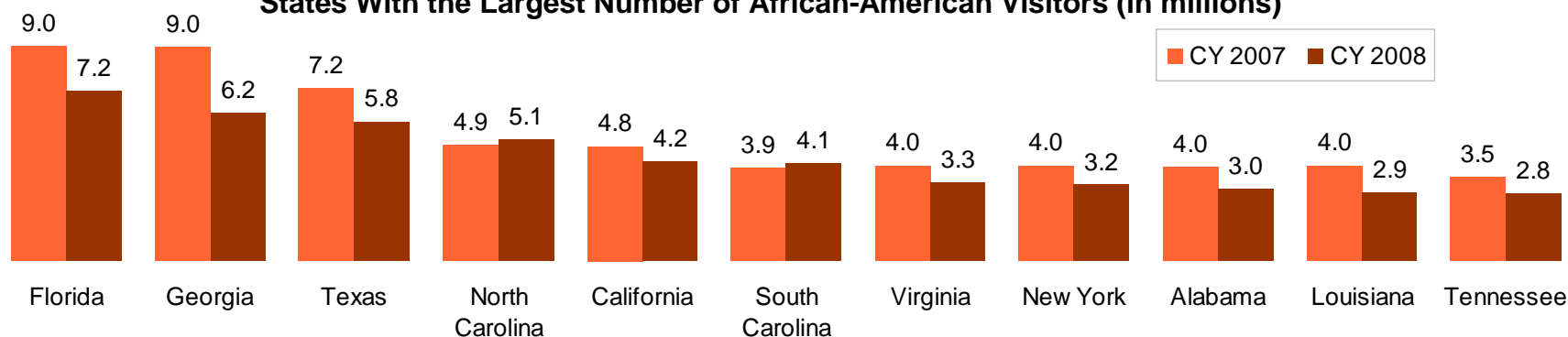
QC: How old are you? Panel: Residence and ethnicity (Household Level)

# African-American Travelers

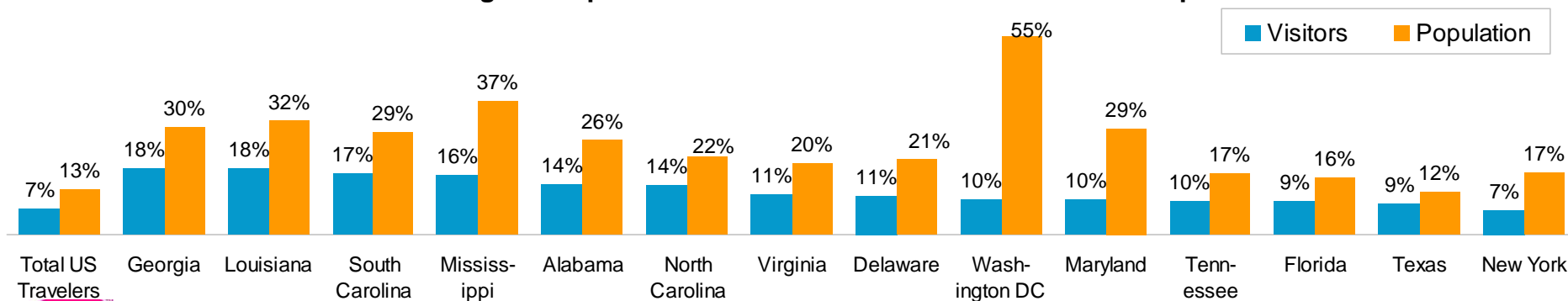
## African-Americans are also traveling less

- Florida, Georgia, and Texas continue to enjoy the greatest number of African-American visitors; however these numbers fall significantly since 2007. North and South Carolina are the only states to grow the number of African-American visitors in 2008, and travel among this group appears to reflect declining total US trends.
- In terms of proportion of visitors, Georgia and Louisiana (both 18%) remain at the top, but fall from 23% and 20% respectively in 2007. South Carolina moves up to 3<sup>rd</sup> place from 5<sup>th</sup>.

**States With the Largest Number of African-American Visitors (in millions)**



**States with the Largest Proportion of African-Americans: Visitors and Population**



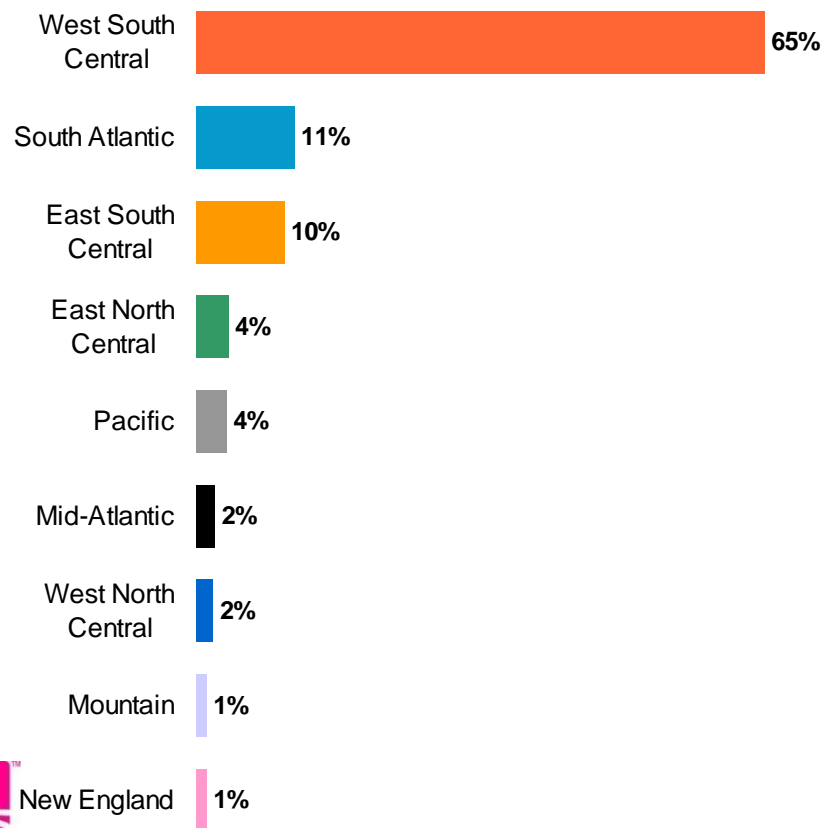
# Visitor Origin: Region and State

## Visitor Residence

- Louisiana continues to source two-thirds of its visitors from the West South Central census region, driven primarily by Louisiana (36%) and Texas (27%).
- Mississippi (6%), in the East South Central region, ranks third among Louisiana's sources.
- Florida (4%) and Georgia (3%), in the South Atlantic region, round out the top five.

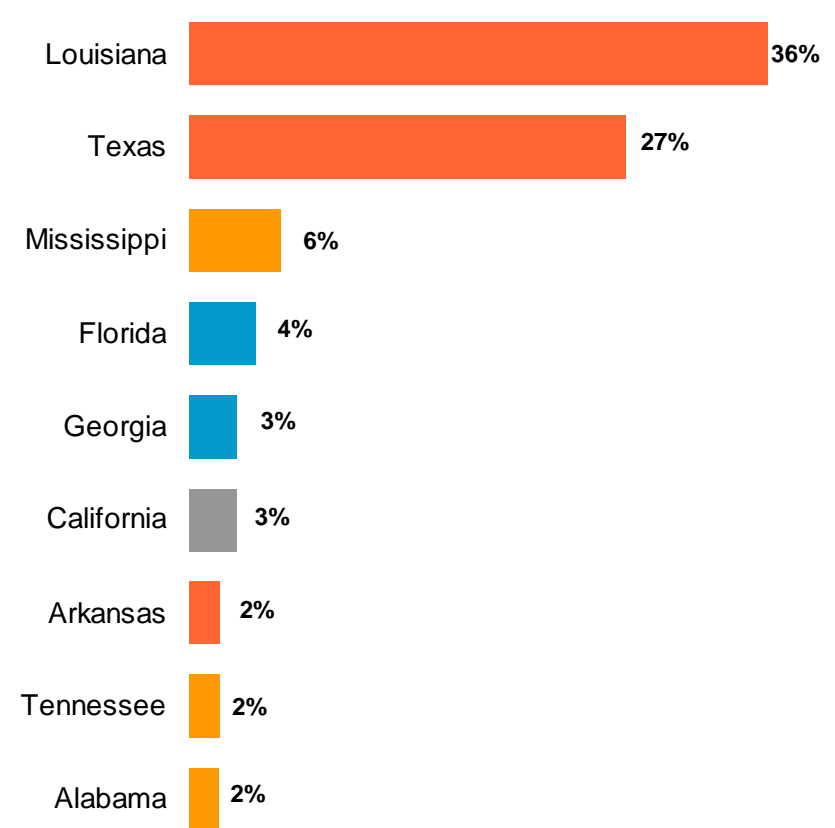
### Source of Louisiana Visitors: Census Region

Base: Louisiana Visitors



### Source of Louisiana Visitors: Top States

Base: Louisiana Visitors



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Panel: State/Region residence of those who visited Louisiana (Household Level)

# Geography (Census Region State Composition)

States within regions shown

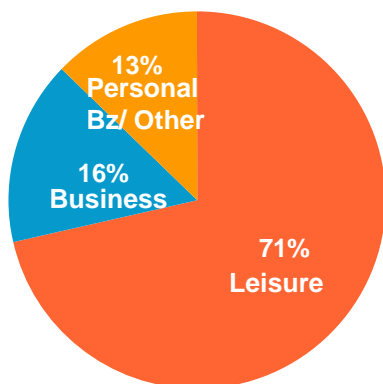
New England	Mid Atlantic	South Atlantic	East South Central	West South Central	East North Central	West North Central	Mountain	Pacific
CT	NJ	DL	AL	AR	IL	IA	AZ	CA
ME	NY	DC	KY	LA	IN	KS	CO	OR
MA	PA	FL	MS	OK	MI	MN	ID	WA
NH		GA	TN	TX	OH	MO	MT	
RI		MD			WI	NE	NV	
VT		NC				ND	NM	
		SC				SD	UT	
		VA					WY	
		WV						

# Visitor Origin: Top DMAs

## Visitor Residence

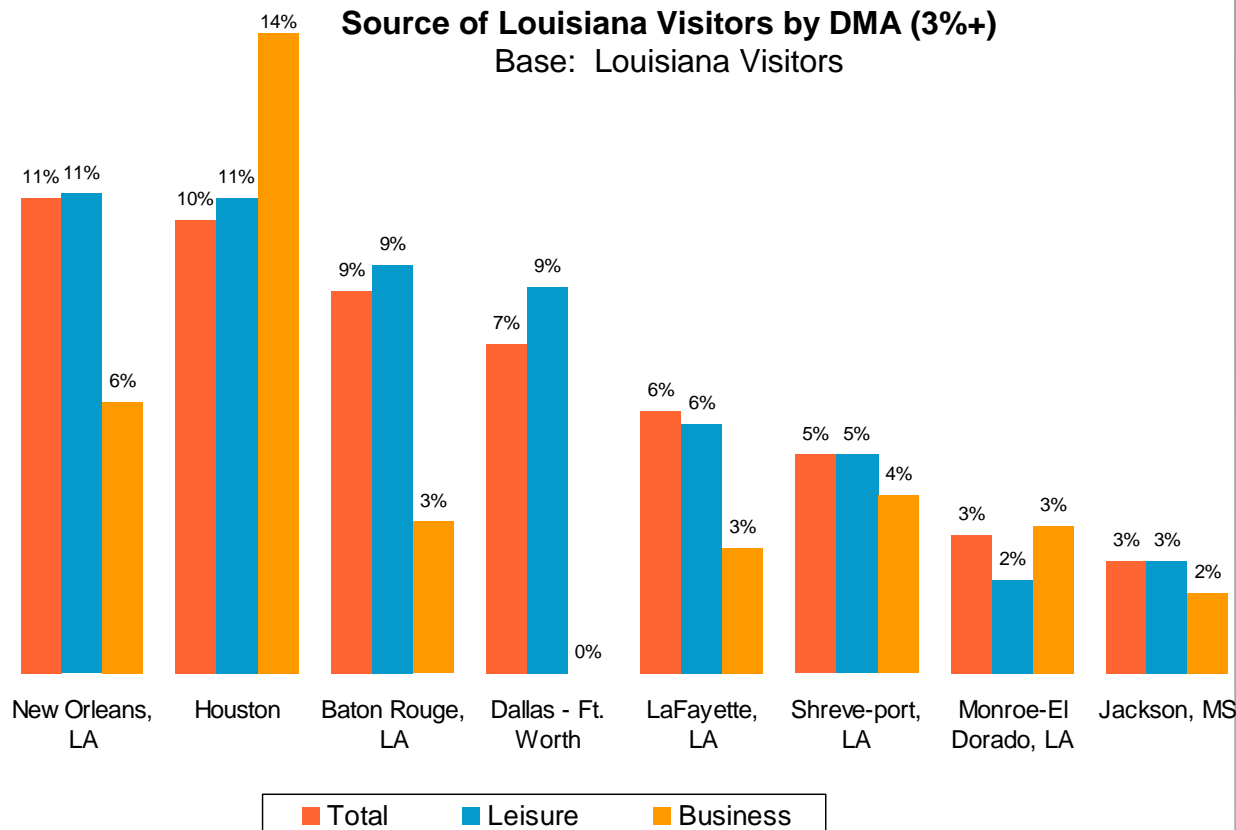
- Residents of New Orleans and Houston provide the greatest proportion of visitors to Louisiana – with Houston standing out on business travelers.
- Relative to 2007, New Orleans (-4pp) and Baton Rouge (-7pp) provide fewer business travelers.

**Purpose of Trip**  
Base: Louisiana Visitors



**Source of Louisiana Visitors by DMA (3%+)**

Base: Louisiana Visitors



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Q1b: Which of the following was the primary purpose for the trip? Household Level)  
Panel: DMA residence of those who visited Louisiana (Household Level)

# Louisiana's Business Development Index – Top 15

## Louisiana's High BDI Marketing Area

- Louisiana attracts the largest proportion of residents from nearby Mississippi and Texas DMAs.
- Overall, 28 DMA areas show above average (index exceeds 100) likelihood to visit Louisiana; the top 15 are shown at right.
- The Business Development Index is calculated for each DMA to measure the propensity of US residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Tyler-Longview, TX residents represent 0.235% of all US residents, but 2.661% of total Louisiana visitors. This yields an index value of 1132 ( $2.661 / .235 * 100$ ).
- A list of the 50 highest BDI DMAs for Louisiana are listed in the Appendix at the end of the report.

Louisiana High BDI Index

DMA of Origin	INDEX
Tyler-Longview (Lufkin & Nacogdoches), TX	1132
Hattiesburg-Laurel, MS	1019
Jackson, MS	826
Beaumont-Port Arthur, TX	820
Meridian, MS	468
Greenwood-Greenville, MS	445
Houston, TX	424
Biloxi-Gulfport, MS	380
Waco-Temple-Bryan, TX	289
Dallas-Ft. Worth, TX	283
Columbus-Tupelo-West Point, MS	224
Wichita Falls & Lawton, TX-OK	203
San Antonio, TX	198
Mobile-Pensacola (Ft. Walton Beach), AL-FL	182
Rochester-Mason City-Austin, MN-IA	178



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Panel: State/Region residence of those who visited Louisiana (Household Level)

# Visitor Demographics

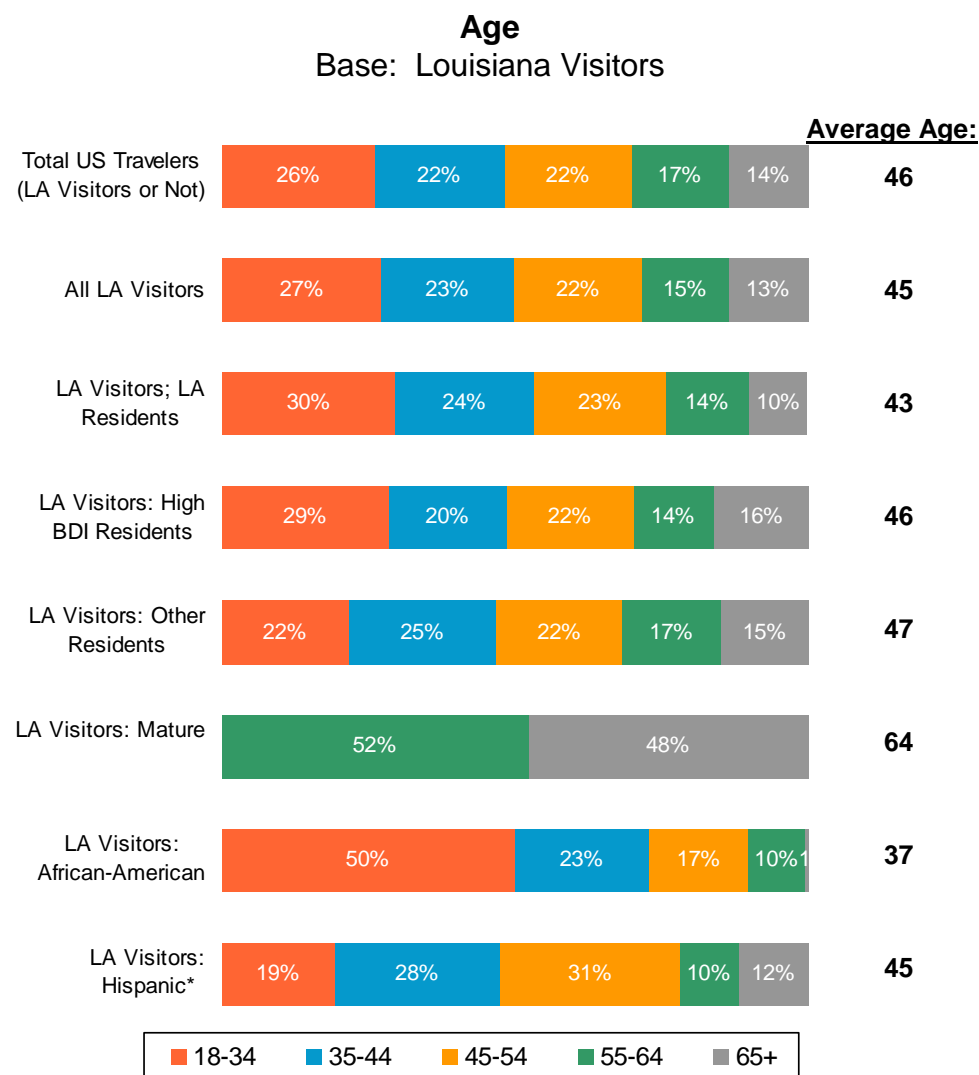


# Age of Visitors

## Age patterns vary somewhat by key segments

Consistent with 2007, Louisiana visitors resemble other US travelers, with a near match on the average age (45 vs. 46). Further:

- Of Louisiana visitors segments, the youngest visitors continue to be African-American (37) and those who live in the state (43).
- The Mature market (64) is older by definition. Visitors who live outside of the High BDI area (47) are also slightly older.



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QD: How old are you? (Household Level) // \*Caution: Small base size n=30

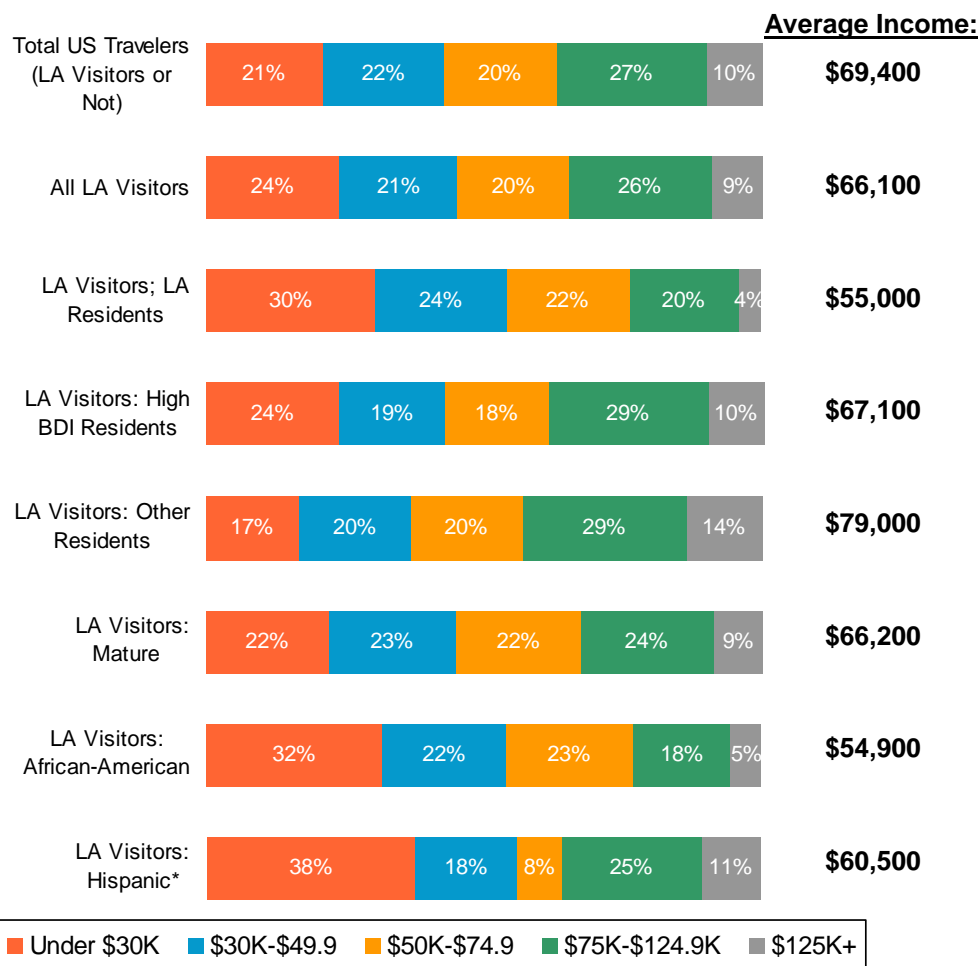
# Household Income of Visitors

## Wide income gaps appear between segments

Louisiana visitors report higher incomes than in 2007 (\$66,100 vs. \$61,000) but continue to lag typical US travelers (\$69,400). In addition:

- Not surprisingly, those traveling the farthest (reside outside of Louisiana and the High BDI Marketing Area) and thus incurring the greatest travel costs, report the highest incomes (\$79,000). Residents in the High BDI Marketing Area rank second (\$67,100).
- In-state visitors and African Americans rank last at \$55,000 and \$54,900 respectively.
- Mature visitors (\$66,200) are on par with the Louisiana average.

**Household Income**  
Base: Louisiana Visitors



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Panel: Income (Household Level) // \*Caution: Small base size n=30

# Other Visitor Demographics

## Overall Louisiana visitors reflect US traveler patterns, but key segments vary from these patterns

- Ethnicity reveals the greatest difference between Louisiana visitors and total US travelers; 16% of Louisiana visitors are African-American, more than twice the national average (7%). This is also true of Louisiana residents (15%) and those residing in High BDI markets (19%).
- Louisiana visitors are slightly less likely to be married than average (58% vs. 61%), driven by lower marriage rates among African-Americans (41%), Hispanics (52%), Louisiana residents (57%), and other areas (56%).
- African-American visitors (50%) and Louisiana residents (39%) are the most likely to live with children.
- Mature visitors and those outside the High BDI marketing area tend to live alone (29% and 24% respectively) or with one other person (56% and 37% respectively), and not surprisingly are the least likely to live with children (7% mature, 30% other markets).

### Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
% Male	44%	42%	41%	43%	40%	49%	28%	35%
% Married	61	58	57	60	56	60	41	52
Household Composition								
% One Person	21%	20%	16%	22%	24%	29%	24%	9%
% Two People	35	36	36	36	37	56	23	36
% Three or More	44	44	48	42	39	15	53	55
% With Children	36	36	39	37	30	7	50	29
Ethnicity								
% Caucasian	88%	81%	83%	78	81	93%	na	na
% African-American	7	16	15	19	13	6	100	na
% Hispanic	4	4	3	4	4	3	na	100



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QE: Please indicate your gender.

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level)

\* Caution: Small base size n=30

# Other Visitor Demographics – (con't)

## Louisiana visitors resemble visitors to other areas, with a few variations

- Louisiana visitors match the national average when it comes to full time employment (60% vs. 59%) with the exception of African-American visitors who are the most likely to be employed full time (70%), and Mature visitors who are more likely to be retired (52%).
- In general, Louisiana residents indicate somewhat less formal education than the national average (40% vs. 43%), even more pronounced among Louisiana residents (35%). Residents outside Louisiana and the High BDI Marketing Area (Elsewhere) indicate above average formal education (47%).

### FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
FutureView								
% Shapers/Makers	31%	32%	30%	33%	32%	23%	35%	52%
% Today Consumers	39	37	32	40	38	36	35	31
% Yesterday/Yesteryear	28	29	34	26	27	39	26	12
Employment								
% Full Time	59%	60%	61%	59%	60%	32%	70%	48%
% Retired	16	17	12	17	22	52	9	26
% Other	25	23	27	23	18	16	21	26
Education								
% 2 yr College or Less	57%	60%	65%	62%	53%	61%	61%	63%
% 4 yr College Grad +	43	40	35	38	47	39	39	38



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FutureView and Panel: Employment, Education. (Household Level)

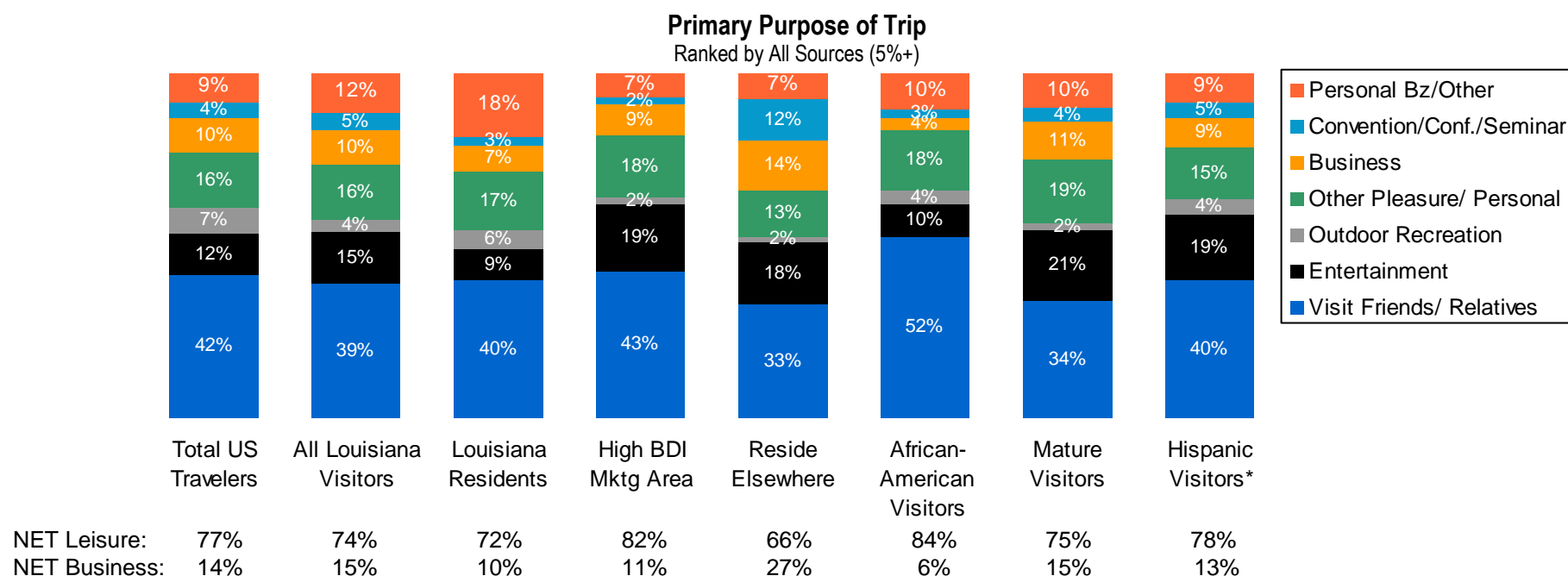
\* Caution: Small base size n=30

# Trip Characteristics and Satisfaction

# Trip Purpose

## Pleasure remains the primary reason to visit Louisiana

- Similar to total US travel, visiting friends and family is the primary purpose of Louisiana visitors (39%), and even more prominent among African-American visitors (52%).
- Mature visitors, those residing in High BDI marketing areas, and Hispanic visitors are more likely than average to cite entertainment as their reason for visiting.
- Those living outside of Louisiana and the High BDI area (farther away), are the most likely to visit for business purposes, and this reason grows since 2007 (27% vs. 22%). More mature visitors also cite business as the purpose of their trip in 2008 (15% vs. 10%).



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Q1b. Which of the following was the primary purpose of your trip. . . (State Level – demo wtd)

\* Caution: Small base size (n=30)

# Trip Characteristics: Leisure vs. Business Traveler

## Trip Characteristics vary by purpose

- Compared to business travelers, leisure travelers more often: drive their own auto/truck, choose to stay with friends/relatives rather than a hotel, and travel with children.
- Not surprisingly, business travelers fly more frequently, stay longer, and pay for lodging (hotel/motel).
  - More business travelers fly in 2008 (48% vs. 36%) reflecting greater business travel from outside the High BDI area

LOUISIANA VISITORS			
Trip Choices (Trip Level)	Total	Leisure	Business
PRIMARY TRIP PURPOSE			
NET Leisure/Personal	74%	100%	0%
Visit Friends/Relatives	39	53	0
Entertainment/Sightsee	15	19	0
Business; Combined Bs/Ls	15	0	100
Personal Bs/Other	8	0	0
PRIMARY MODE			
% Own Auto/Truck	74%	77%	41%
% Air Travel	14	12	48
AVG # IN TRAVEL PARTY	2.8	2.9	2.3
% Traveling Solo	28%	20%	69%
% Traveling With Children	26	32	3

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

LOUISIANA VISITORS			
Lodging (State Level)	Total	Leisure	Business
AVG # NIGHTS (if any)	3.1	3.0	3.7
Private Home	1.4	1.7	0.1
Hotel/Motel	1.3	0.9	2.9
All Other	0.2	0.2	0.1

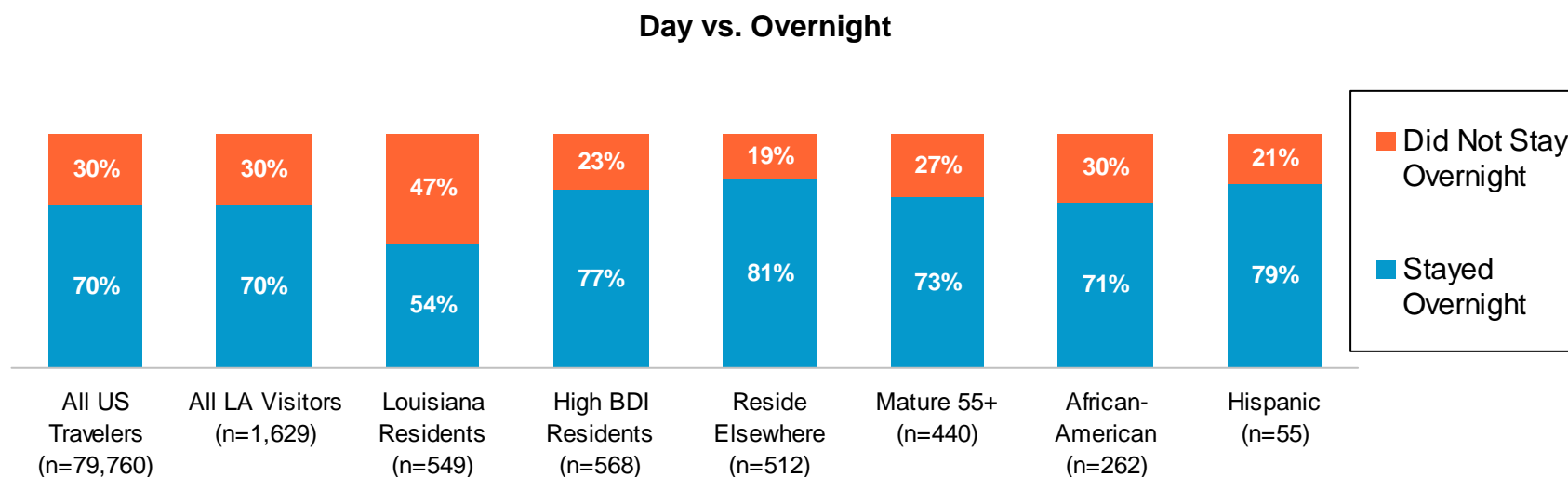
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).



# Visitor Nights: Day vs. Overnight

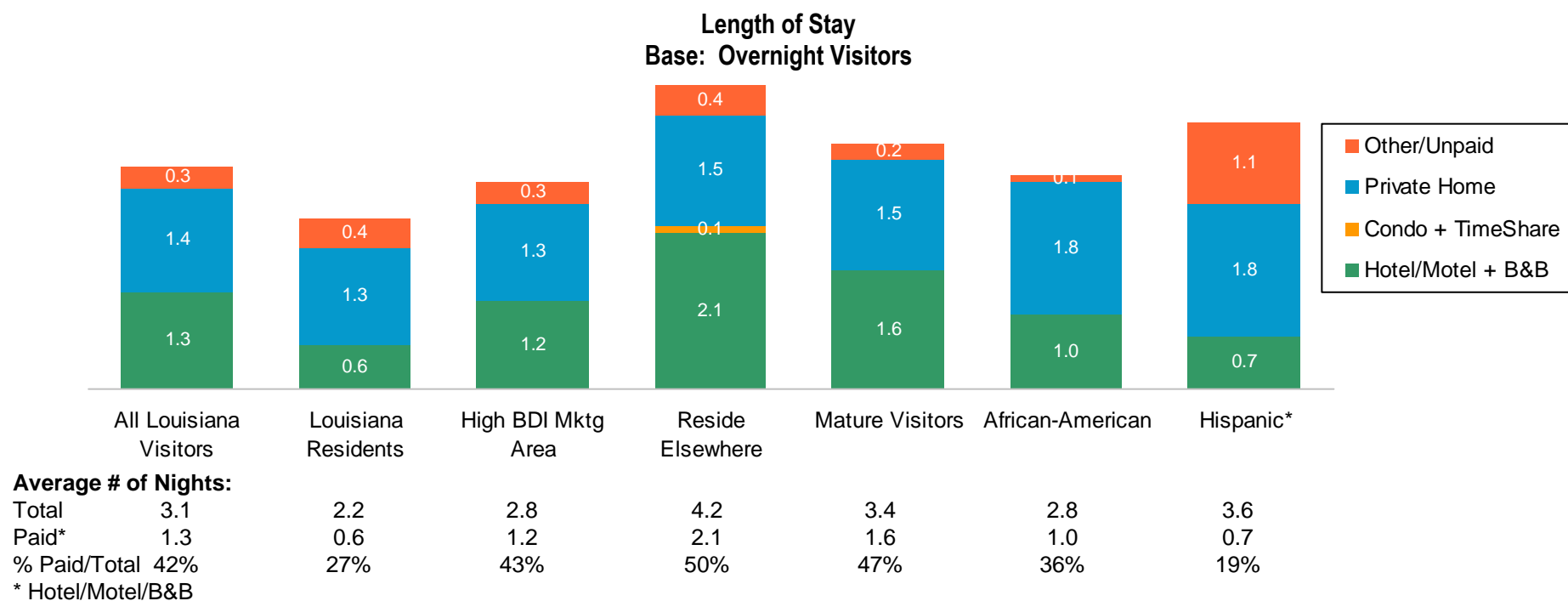
## Overnight trips dominate leisure trips

- 7 in 10 Louisiana visitors stay overnight, at parity with other US travelers and up from 67% in 2007.
- Logically, those who live in-state are most likely to take a day-trip (47%); conversely, those who travel the greatest distance are most likely to stay overnight (81%).



# Accommodations and Length of Stay

- Those living outside of Louisiana and the High BDI marketing area stay the longest and are more likely to stay in a hotel/motel/B&B corresponding with the distance traveled.
- African-Americans and Hispanics\* stay the most nights in a private home, and Hispanics spend the most time in other/unpaid accommodations (RV/Camping/etc...).



Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

\* Caution: Small base size (n=30)



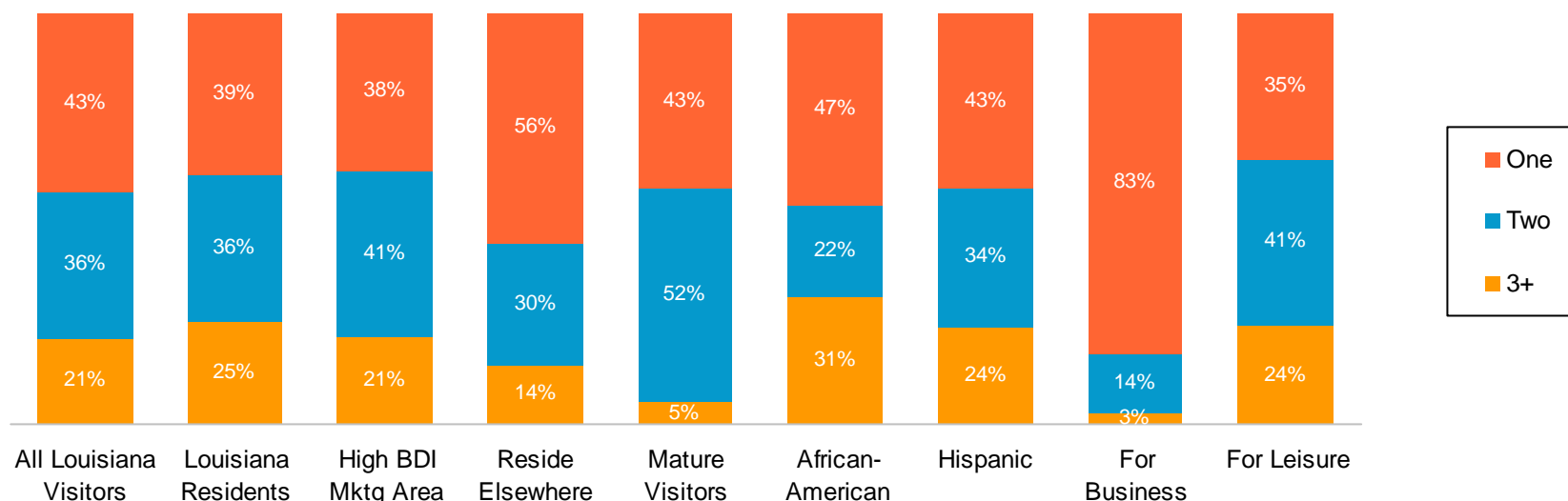
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# Travel Party Size

## Visitors to Louisiana usually travel alone or with one other

- Not surprisingly, Business travelers (83%) are the most likely to travel alone, followed by those living outside of the High BDI area (56%) who also tend to be heavier business travelers.
- Mature visitors also tend toward smaller travel parties, only 5% travel in groups of 3 or more.
- While African-American travel party size is similar to other Louisiana visitors (2.1 vs. 2.0), fewer than average travel in couples (22%). This group has an above average tendency toward traveling alone (47%) and with 3 or more people (31%). They are also the most likely to travel with children (34%).

Number of Household Members in Travel Party (Including Self)



### Average # of Household Members in Travel Party:

Total	1.9	2.0	2.0	1.6	1.7	2.1	1.9	1.2	2.1
% w/Children	23%	28%	24%	14%	3%	34%	18%	2%	27%

NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."



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Q3b. Of travelers, how many live in your household, including yourself (Household State Level – demo wtd)

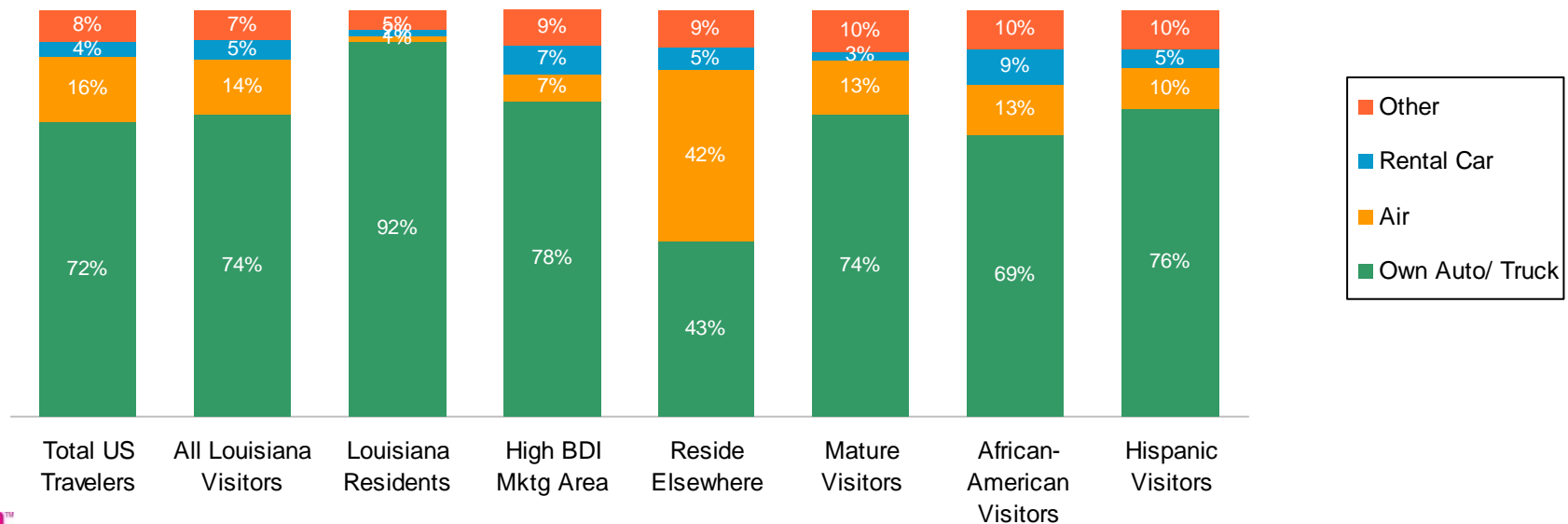
# Primary Mode of Transportation

## Most travelers drive to their destination

**Although overall Louisiana visitors choose transportation similar to overall US travelers, distance notably affects transportation choice:**

- As expected, Louisiana residents drive more often to in-state destinations than any other segment.
- Conversely, those residing outside both the state and the High BDI Marketing Area fly most often.
- African-Americans are more likely than others to rent a car for a vacation trip.

Primary Mode of Transportation of Louisiana Visitors



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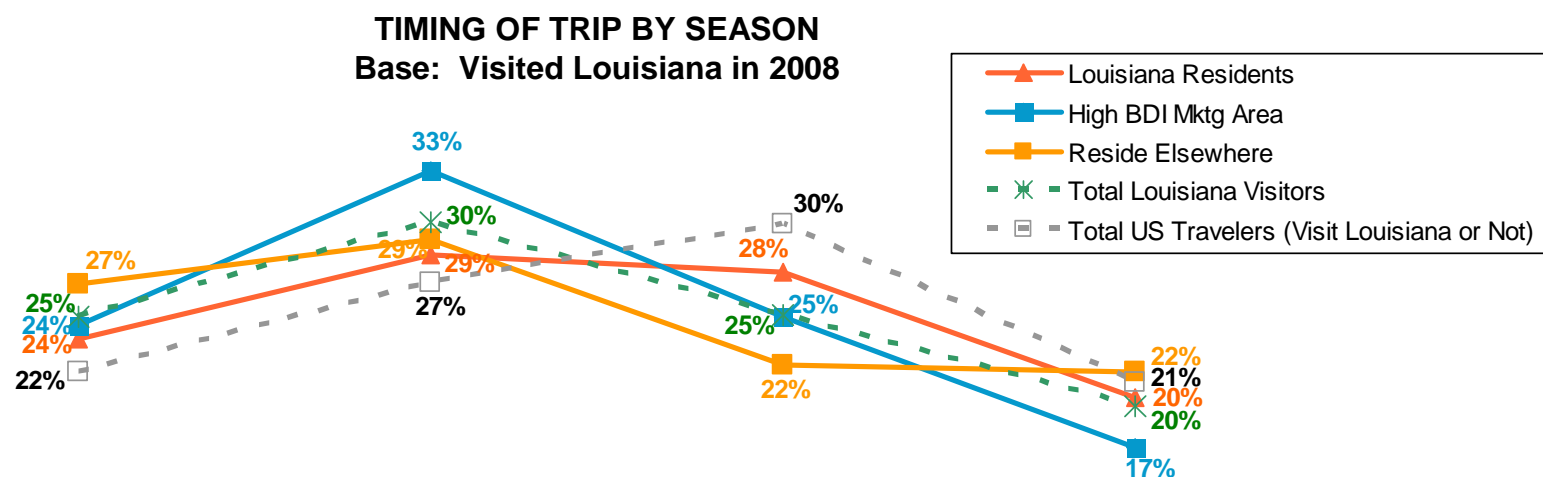
Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)

# Trip Timing

## Nationally, most travel occurs in Summer

However, Louisiana visitors do not always follow the national pattern, with diverse results by area of residence:

- Louisiana residents most frequently travel within the state in **Spring and Summer**
- Those living in the High BDI Marketing Area are most likely to visit in the **Spring** and appear to avoid the **Fall**
- Those living elsewhere are more likely to avoid Louisiana in the Summer, opting to visit in the **Spring** (Winter ranks second) instead
- Fall 2008 ranks last for all groups – coinciding with the financial banking crisis.



Winter (Jan, Feb, Dec)

Spring (Mar, Apr, May)

Summer (Jun, Jul, Aug)

Fall (Sep, Oct, Nov)

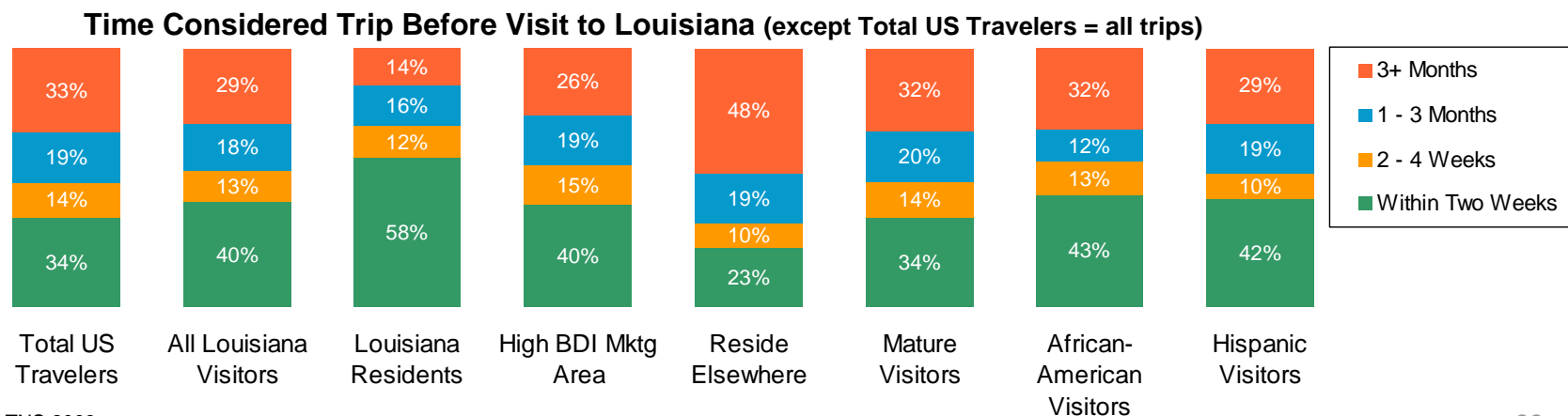
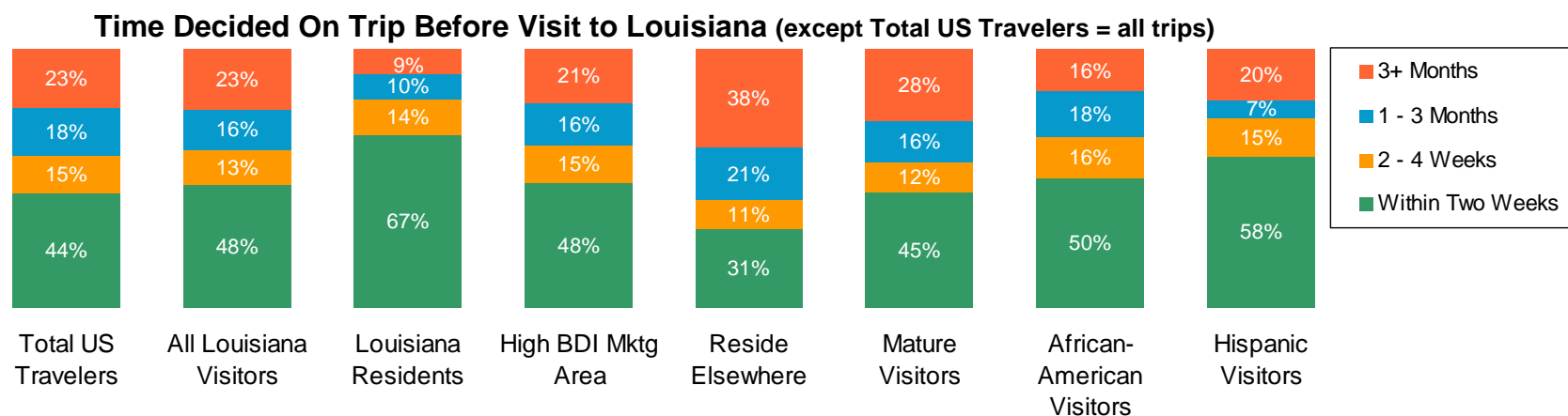
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Month Traveled (wave of questionnaire) (Household Level)

# Trip Planning – Timing

## Logical patterns occur for trip planning

- With fewer planning to spend the night, in-state visitors consider and decide to take relatively spontaneous trips.
- Conversely, those traveling from farther distances (reside elsewhere) have longer planning horizons.
- Mature visitors also tend toward slightly longer planning periods.



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Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

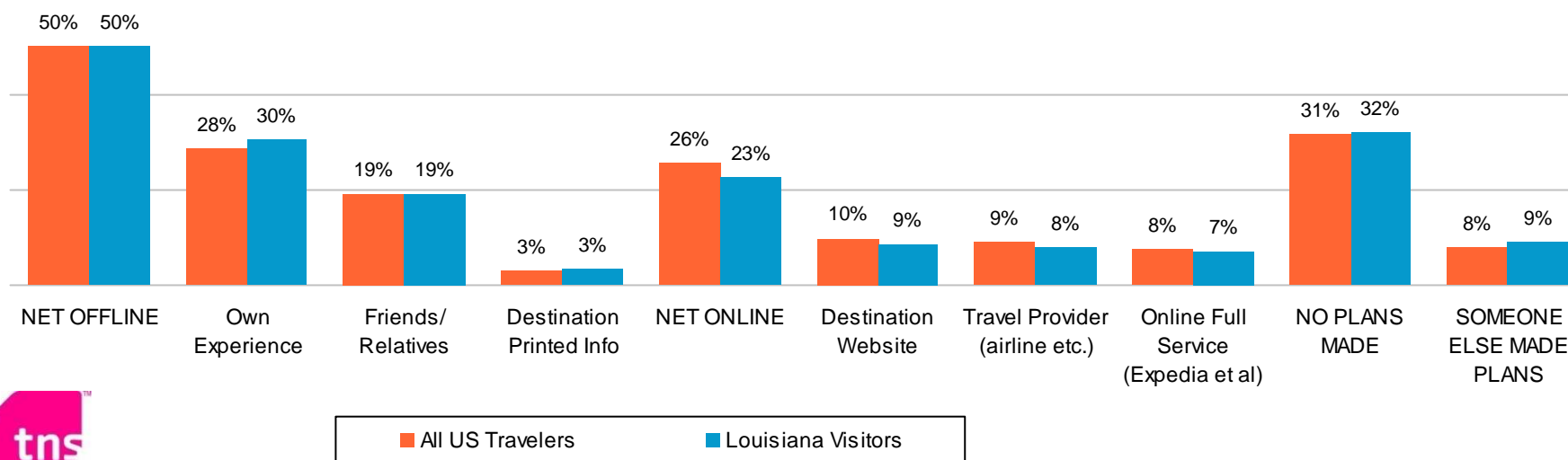
# Trip Planning – Information Sources

## Trip Planning Sources

**Similar to other travelers, past experience and word of mouth are the greatest sources of information for trip planning, both of which are difficult to control.**

- The Internet is a popular place to gather information (26% all travelers vs. 23% for Louisiana visitors), but destination websites are currently used by just 1 in 10 travelers.
- Printed information (3%) has minimal reach and impact.
- A third of leisure travelers (31% - 32%) do not recall “making plans.”

**Information Sources to Plan a Trip**  
Ranked by All Sources (5%+)



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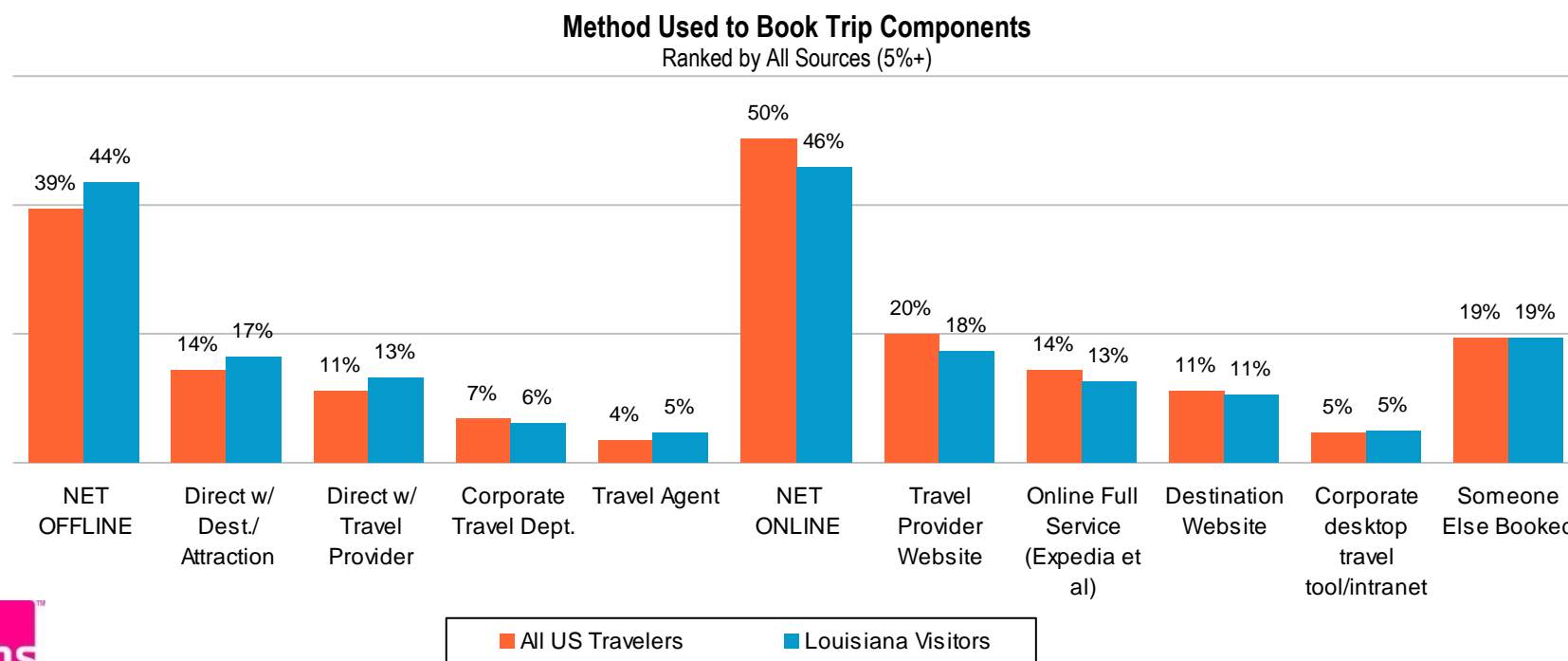
Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

# Trip Booking

## Trip Booking Methods

**Despite gathering information from similar sources, Louisiana visitors book their trip components differently than other travelers:**

- While US travelers do more *online* trip booking than *offline* (50% vs. 39%), Louisiana visitors are more evenly split (46% vs. 44% respectively). This suggests Louisiana visitors may not be as Internet-savvy or prefer interacting with a person.
- Further, *travel provider website - online* (18%) and *direct with destination/attraction - offline* (17%) tie for first among Louisiana visitors.



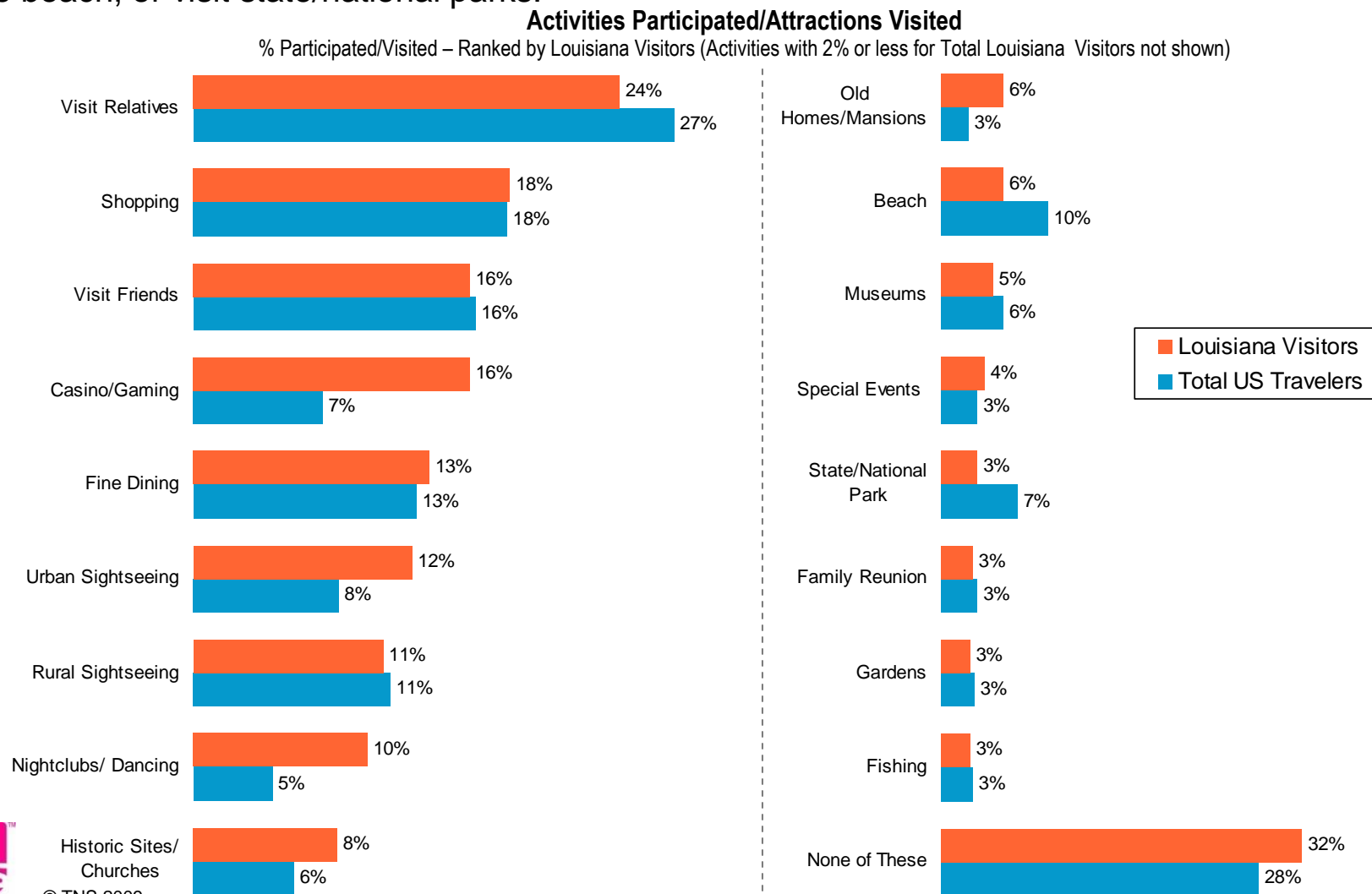
© TNS 2009

Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

# Trip Characteristics: Vacation Activities Overall

## Top Vacation Activities/Attractions

Louisiana visitors more often play casino games, go sightseeing in cities, visit nightclubs, and view old homes, mansions, historic sites, and churches. However, they less frequently visit relatives, go to the beach, or visit state/national parks.



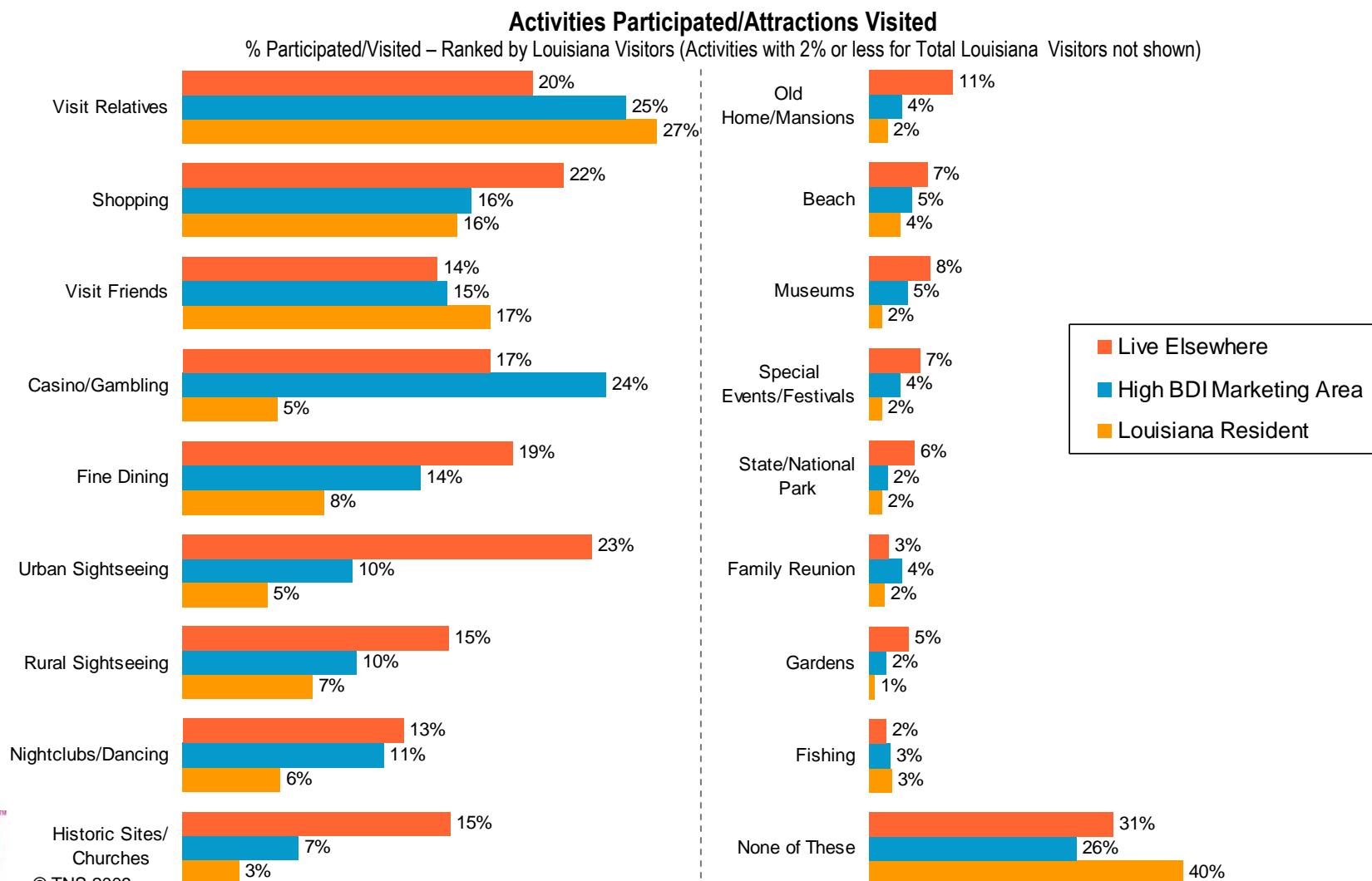
© TNS 2009

Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

# Trip Characteristics: Vacation Activities by Residence

## Residence impacts the choice of activities in Louisiana

In-state visitors more often visit relatives and friends, but otherwise lag non-residents on nearly every activity. Those living outside of Louisiana and not in the High BDI Marketing Area) take greater advantage of nearly all Louisiana's tourism features. However, those in the High BDI Marketing Area are most likely to visit casinos/gamble.



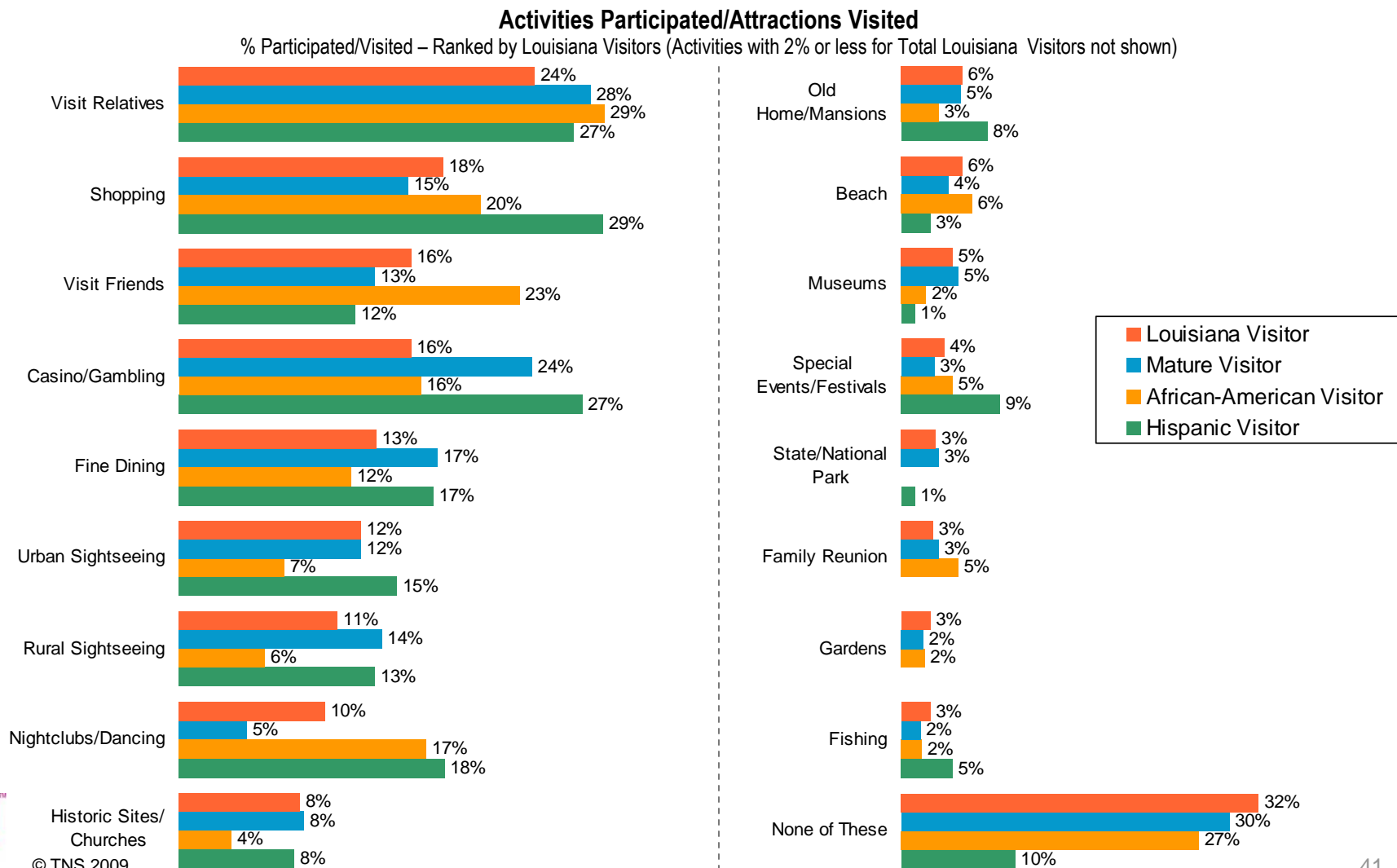
© TNS 2009

Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

# Trip Characteristics: Vacation Activities by Segment

## Activities also vary by key travel segment

Consistent with their travel purpose, African-Americans are much more likely to *visit friends* while in Louisiana. Together with Hispanic visitors, African-Americans more often go to *nightclubs*. Compared to others, the Mature and Hispanic segments more often choose *casinos/gaming*, *fine dining*, and *sightseeing*.



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

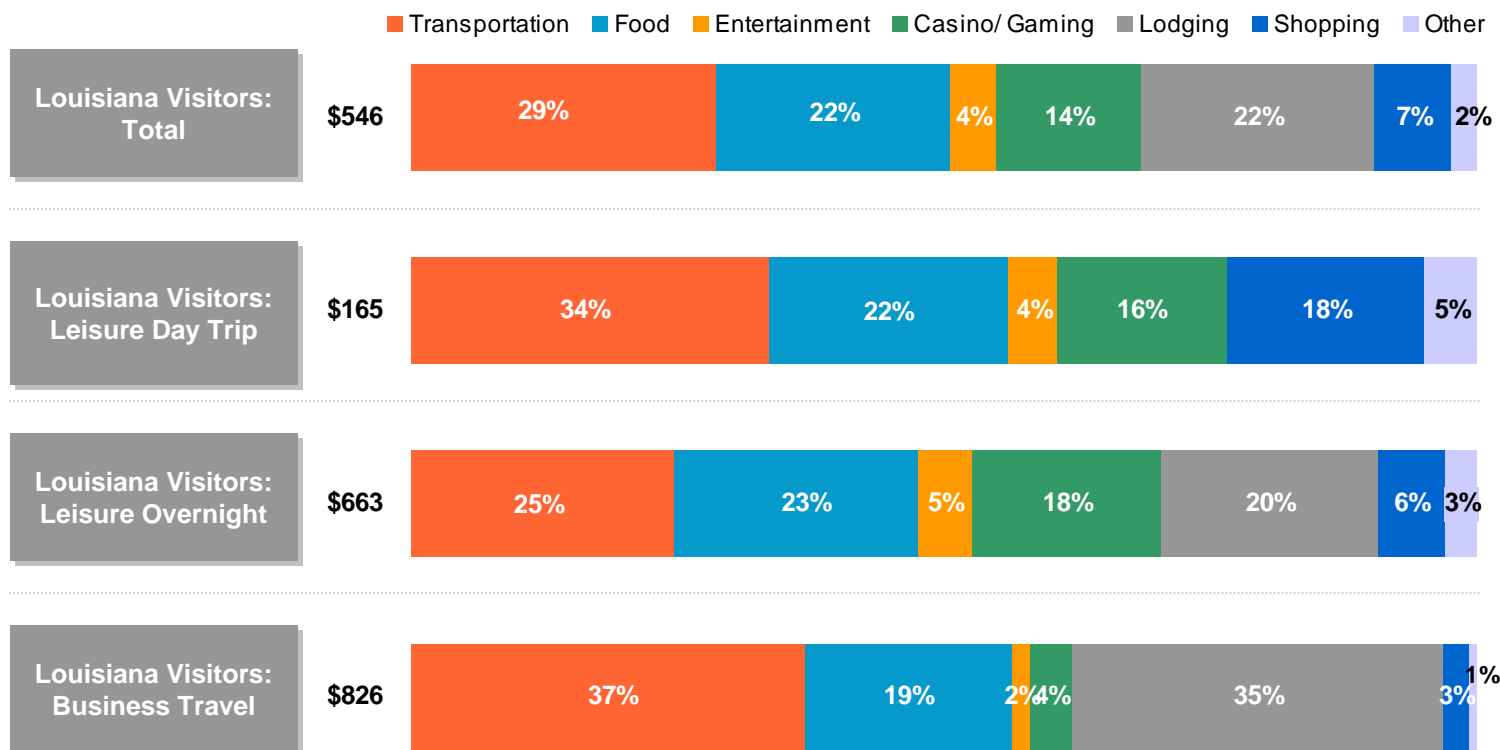
# Trip Characteristics: Expenditures by Type of Travel

## Value of Visitors

- Overnight visitors spend four times as much as day trip visitors (\$663 vs. \$165), a gap even larger than last year (\$614 vs. \$188)
- Overnighters stay longer, of course, and allocate a large share of their travel budget for lodging
- Business travelers assign larger portions of their travel budget to lodging and transportation (consistent with their greater likelihood of flying).

### Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.  
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Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

# Trip Characteristics: Expenditures by Residence

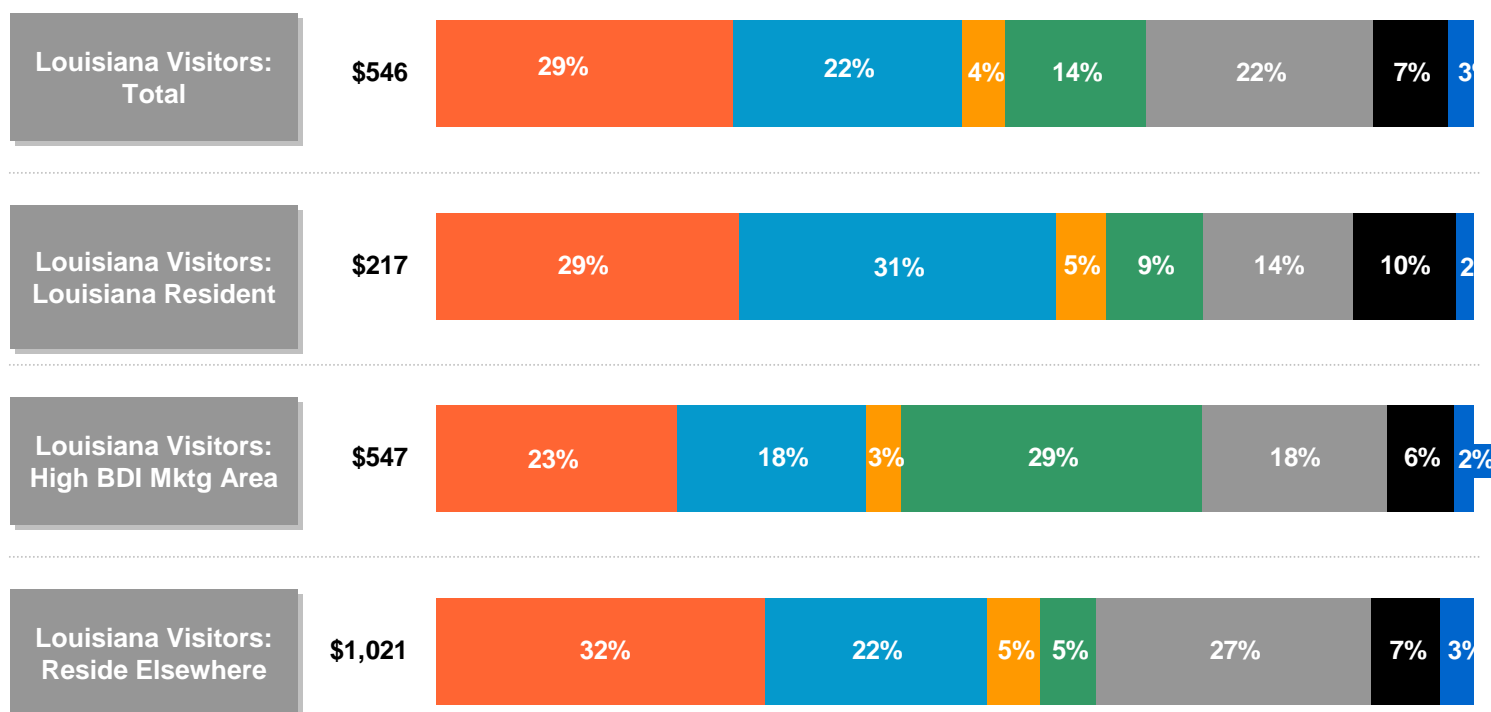
## Value of Visitors

- Logically, those traveling a greater distance spend a larger portion of their budget on lodging (27%) and also spend the most on transportation (presumably many fly)
- High BDI Marketing Area residents spend the largest share (29%, which is also the largest amount of any segment -- \$158) on gaming
- Food "consumes" the largest bite out of in-state visitors' expenditures (transportation follows closely).

### Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)

Transportation Food Entertainment Casino/ Gaming Lodging Shopping Other



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.  
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Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

# Trip Characteristics: Expenditures by Segment

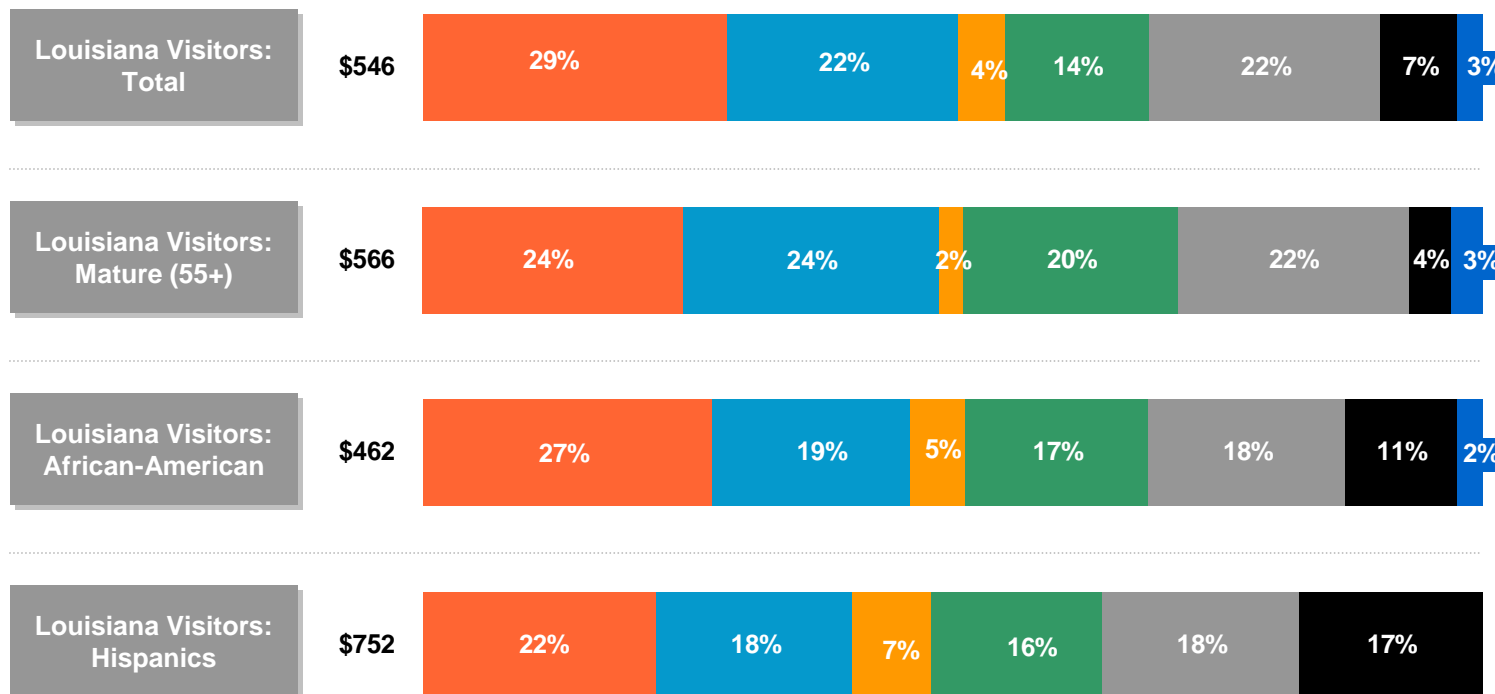
## Value of Visitors

- Mature visitors spend slightly more than others in LA (\$566 vs. \$546 overall), particularly on gaming
- African-Americans tend to spend less and Hispanics more – a pattern noted last year
- African-Americans and Hispanics spend slightly more on entertainment – consistent with their activity choices (above average selection of nightclubs and dancing) – and both also make proportionately more shopping purchases.

### Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)

■ Transportation ■ Food ■ Entertainment ■ Casino/ Gaming ■ Lodging ■ Shopping ■ Other



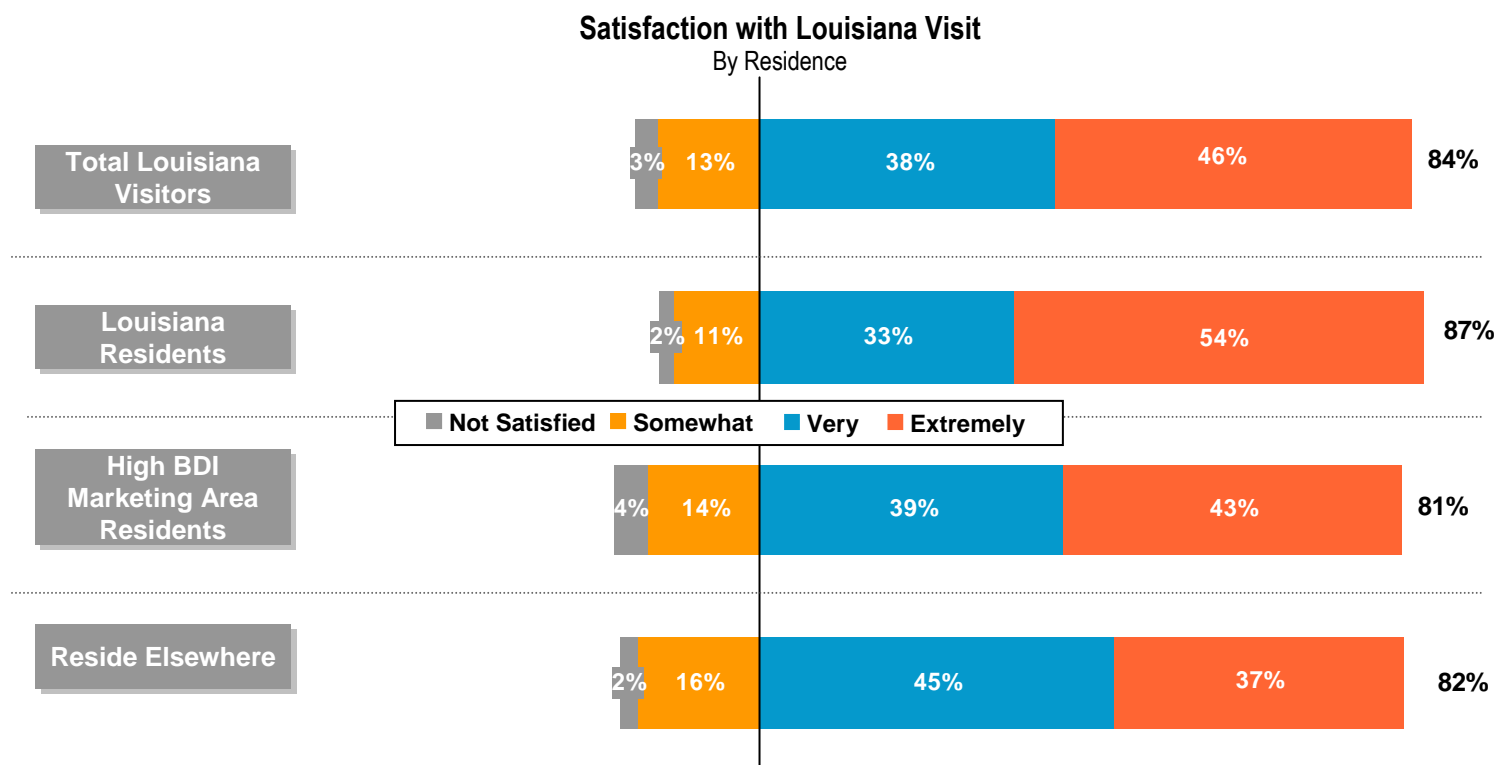
Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.  
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Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

# Satisfaction: Louisiana By Residence

## Satisfaction is strong regardless of residence

- Top box (extremely satisfied) endorsements correlate with proximity, and not surprisingly Louisiana residents provide the most favorable ratings of their home state.
- More than 8 in 10 visitors from both the High BDI marketing area and 'elsewhere' are also happy with their trip.
- Less than 5% of visitors across geographies express dissatisfaction with Louisiana as a destination.



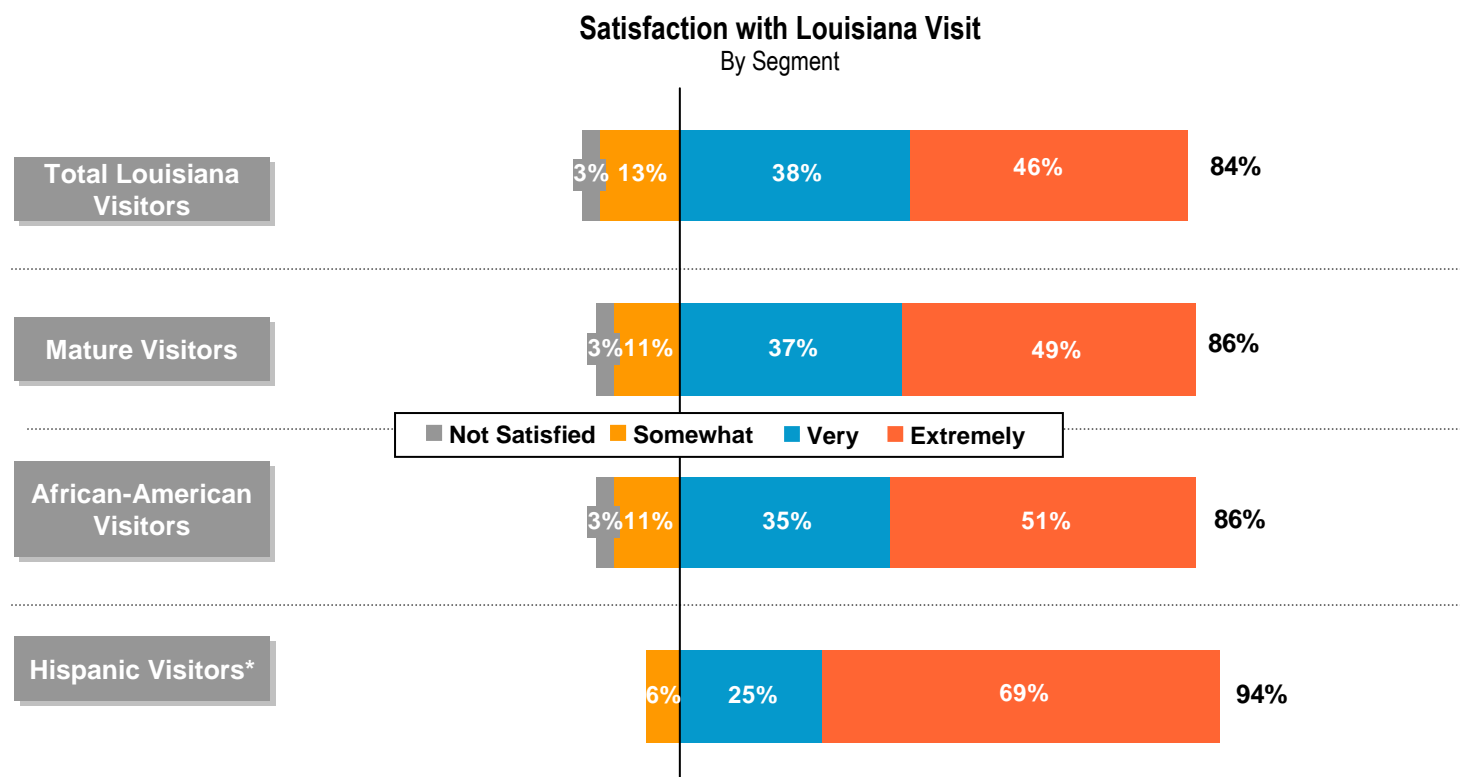
\*Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*  
© TNS 2009

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

# Satisfaction: Louisiana By Segment

## Satisfaction is also quite strong across key segments

- Satisfaction among Mature (86%) and African-American (86%) visitors matches total Louisiana visitors.
- Hispanic visitors indicate the greatest satisfaction, 69% extremely satisfied, but this is among a small sample.
- Regardless of segment, few (3% or less) visitors indicate displeasure.



Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

© TNS 2009 Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

\* Caution: Small base size (n=30)

# Competitive States



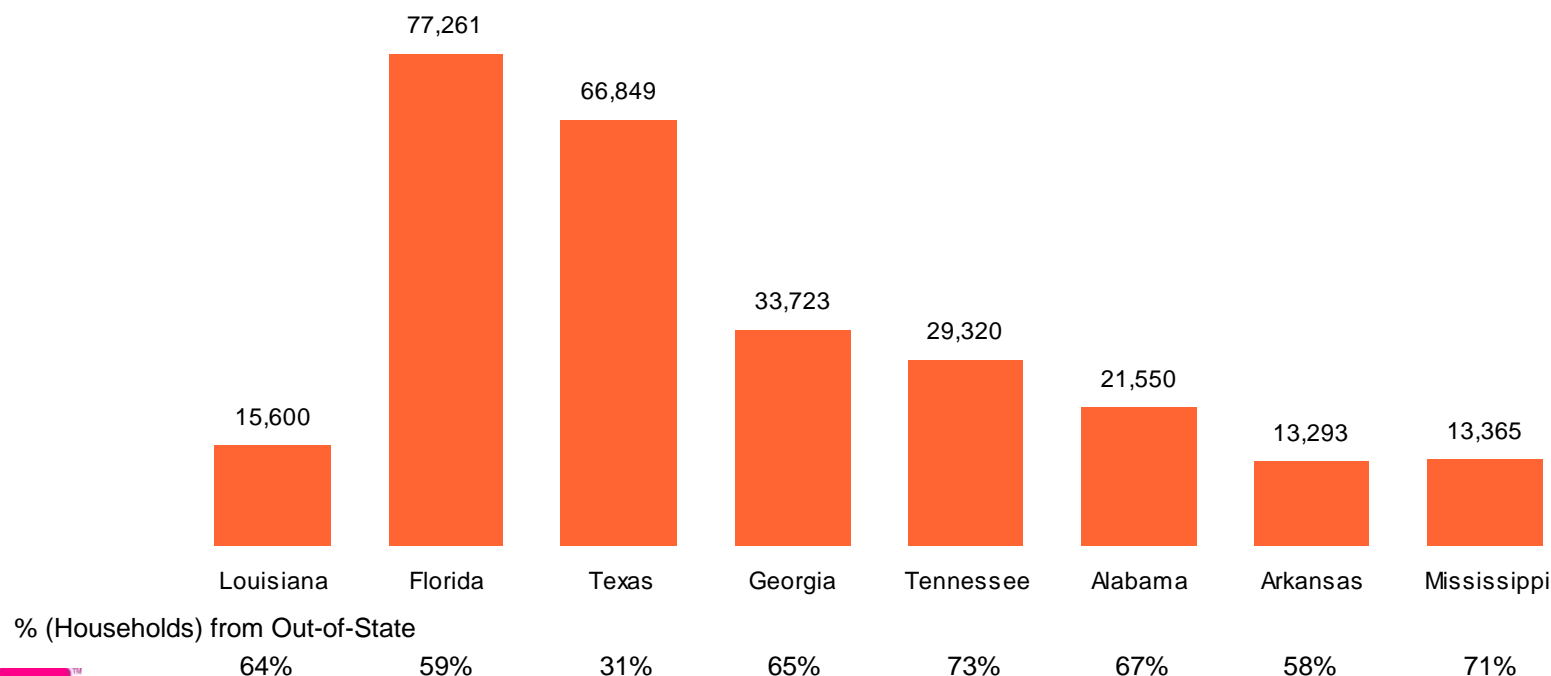
# Competitive States' Visitor Volumes

Among eight key competitors, Louisiana ranks sixth

- Florida and Texas draw the largest share of visitors, although Texas is most dependent of all states upon in-state visitation
- Louisiana draws a relatively high proportion of visitors from out-of-state – most similar to Alabama and Georgia.

Visitors (Person-Trips) to Louisiana and Competitive States

(Volume in 000)



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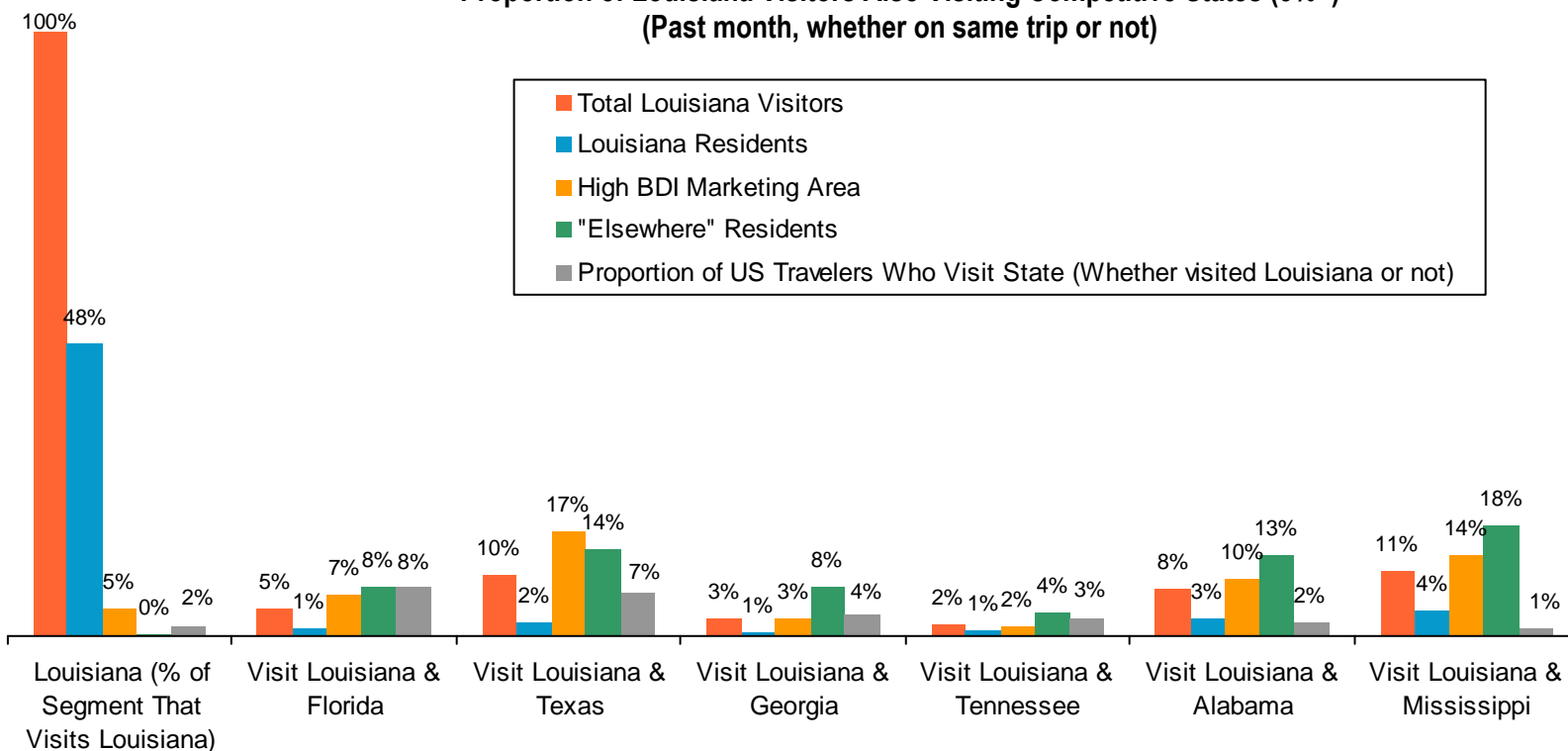
Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

# Key Competitors to Louisiana (Among Louisiana Visitors)

## Louisiana primarily shares its visitors with Texas, Alabama, and Mississippi

- Among the total US market of all travelers, Florida (8%) and Texas (7%) draw the largest share of visitors among these key states. Louisiana and Alabama attract the same proportion of visitors (2%).
- Texas, Alabama, and Mississippi most often entice Louisiana visitors to also stop in their state, whether they live in Louisiana, the High BDI Marketing Area, or Elsewhere.

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+)  
(Past month, whether on same trip or not)



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Q4a. Please indicate the US state(s) visited (Projected Person Trips)

# Competitive State and City Destinations

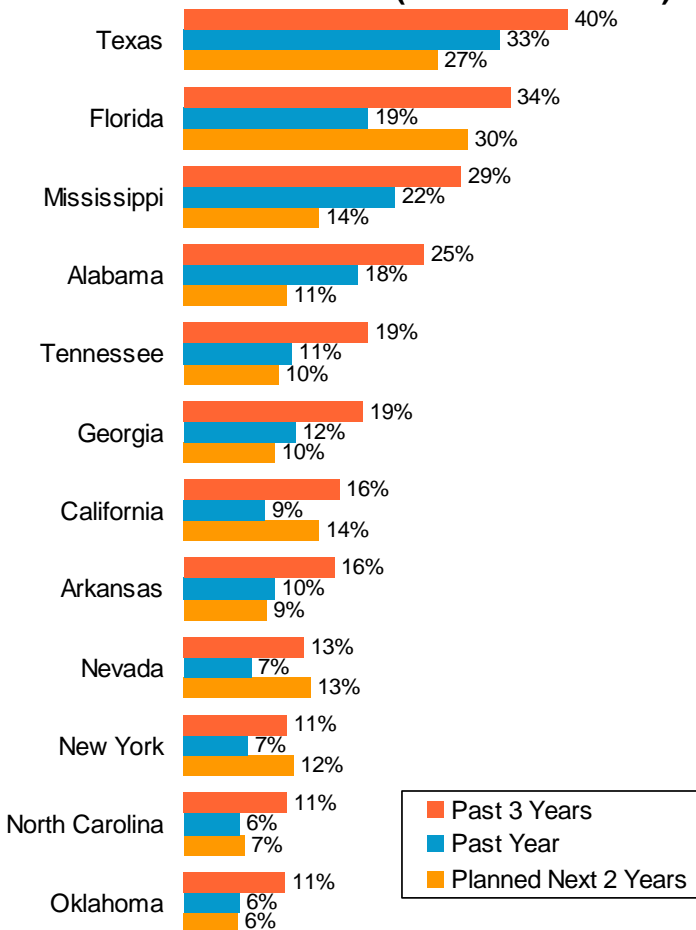
## Southern areas compete with Louisiana

Louisiana visitors continue to choose other southern states for additional vacation travel and New Orleans remains at the top of the list for cities. However, New York, Las Vegas, and Chicago jump to the top of the list for future planned trips.

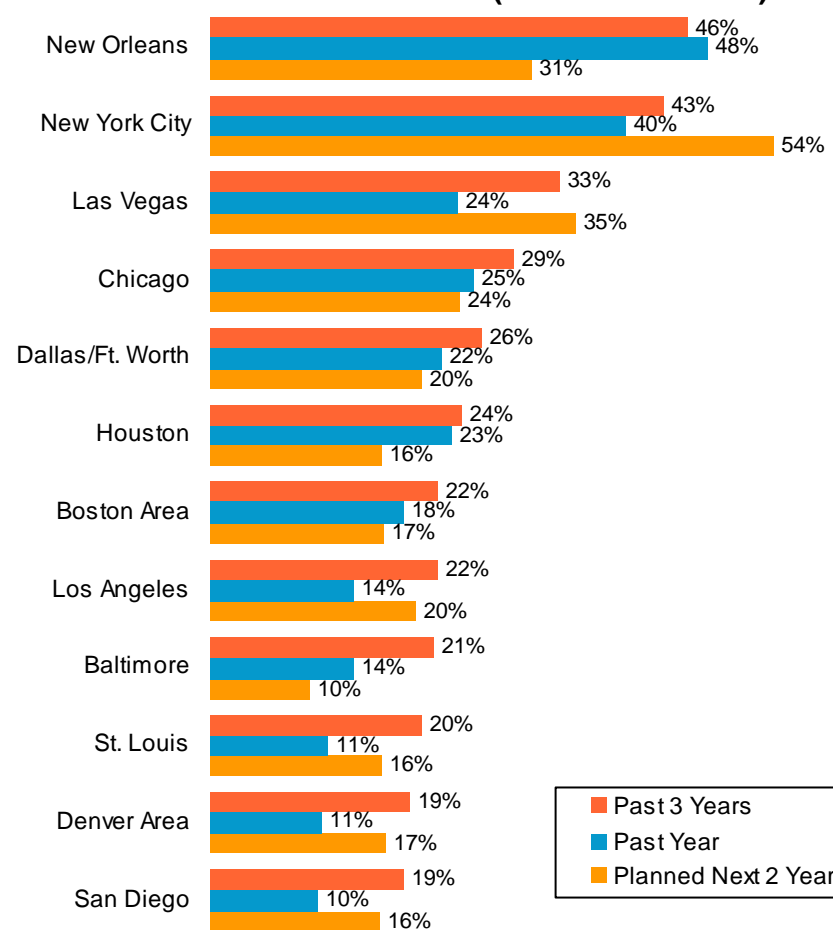
### Other Areas Visited by Louisiana Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

#### Top States Base: Visited Louisiana (Household Level)



#### Top Cities Base: Visited Louisiana (Household Level)



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Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months. Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)

# Another View of Key Competitors (Visited Louisiana or Not)

## Geography impacts destination choices

As noted in other TNS reports, geography plays a key role in destination selection – the states most likely visited vary by travelers' residence:

- **Louisiana residents** are more likely to have visited *Texas* (47%) than *Louisiana* (44%) in the past three years. *Mississippi* (39%) and *Florida* (37%) follow. However, "recency" (past year) moves Louisiana to the lead (40%). For future travel, *Florida* and *Texas* generate the greatest interest
- If travelers **live in the High BDI Marketing Area**, *Texas* tops the list for past visits (3 years or 1 year) while *Florida* (slightly) takes the lead for future plans. *Louisiana* holds third place in all three time periods..
- Those living **elsewhere (neither the High BDI Marketing Area nor Louisiana)** seldom (4% in past 3 years) choose to visit *Louisiana*, usually opting for *Florida*, followed by California and New York.

Visitation (Households) by Residence Over Time

Competitive Set: AL, AR, FL, GA, LA, MS, TN, TX	Visited Past 3 Years	Visited Past Year	Plan to Visit Next 2 Years
<b>RESIDE IN LOUISIANA</b>			
Visit Louisiana	44%	40%	21%
Strongest Competitor (of the set)	47 (TX)	37 (TX)	35 (FL)
Second-Strongest Competitor	39 (MS)	30 (MS)	34 (TX)
Third-Strongest Competitor	37 (FL)	21 (FL)	22 (MS)
<b>RESIDE IN HIGH BDI MKTG AREA</b>			
Visit Louisiana	22%	15%	14%
Strongest Competitor	41 (TX)	36 (TX)	27 (FL)
Second-Strongest Competitor	29 (FL)	18 (FL)	24 (TX)
Third-Strongest Competitor	17 (TN)	12 (GA)	14 (CA)
<b>RESIDE ELSEWHERE</b>			
Visit Louisiana	4%	2%	3%
Strongest Competitor	30 (FL)	19 (FL)	27 (FL)
Second-Strongest Competitor	24 (CA)	16 (CA)	19 (CA)
Third-Strongest Competitor	19 (NY)	13 (NY)	15 (NY)



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Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months.  
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

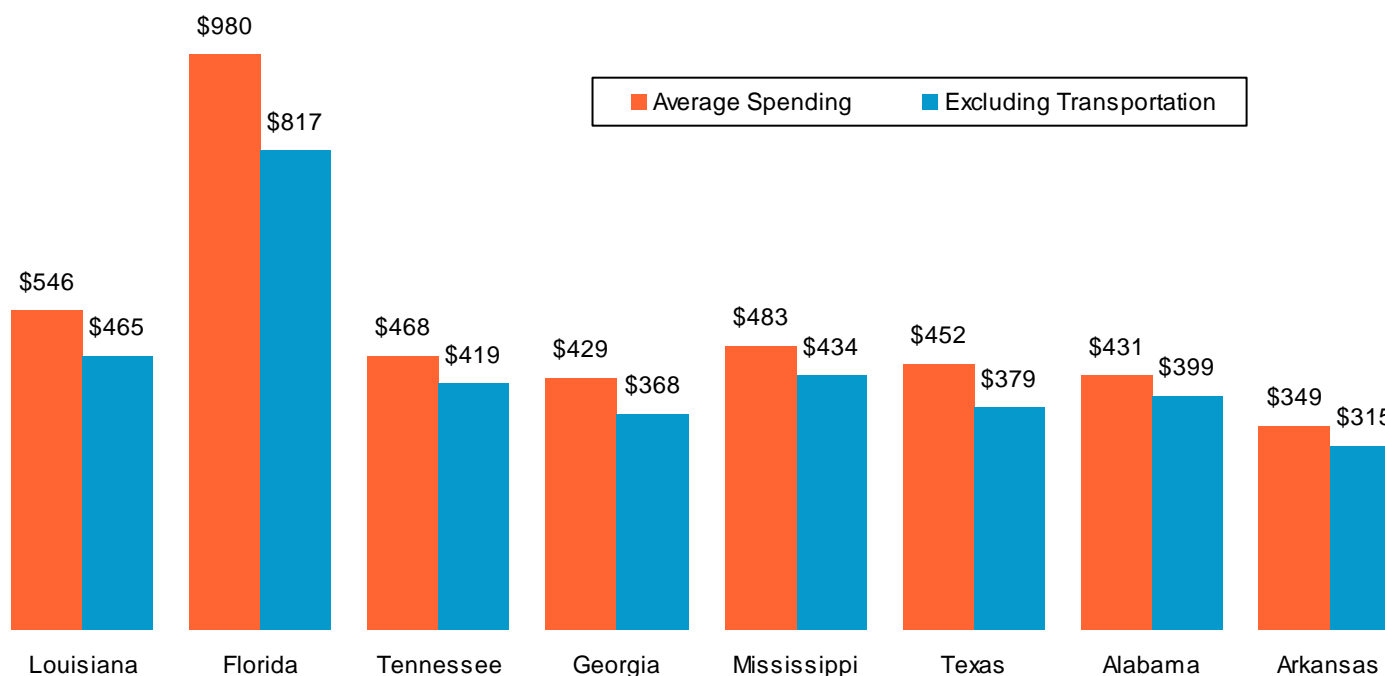
# Competitive Spending: Louisiana vs. Nearby States

Trip spending usually hovers between \$400-\$500

- Florida continues to be the one exception, where (\$980) trip spending nearly doubles nearby states.
- Louisiana (\$546) remains a distant second, with minimal growth since 2007 (\$518).

## Average Annual Spending (Q4g): Louisiana vs. Nearby States

Total Spending (Business/Leisure/Day/Overnight) by Travel Party (Total Spending, including 0)



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Q4g. Please indicate the total dollar amount spent by your travel party (all) . . . (State Level – demo wtd)

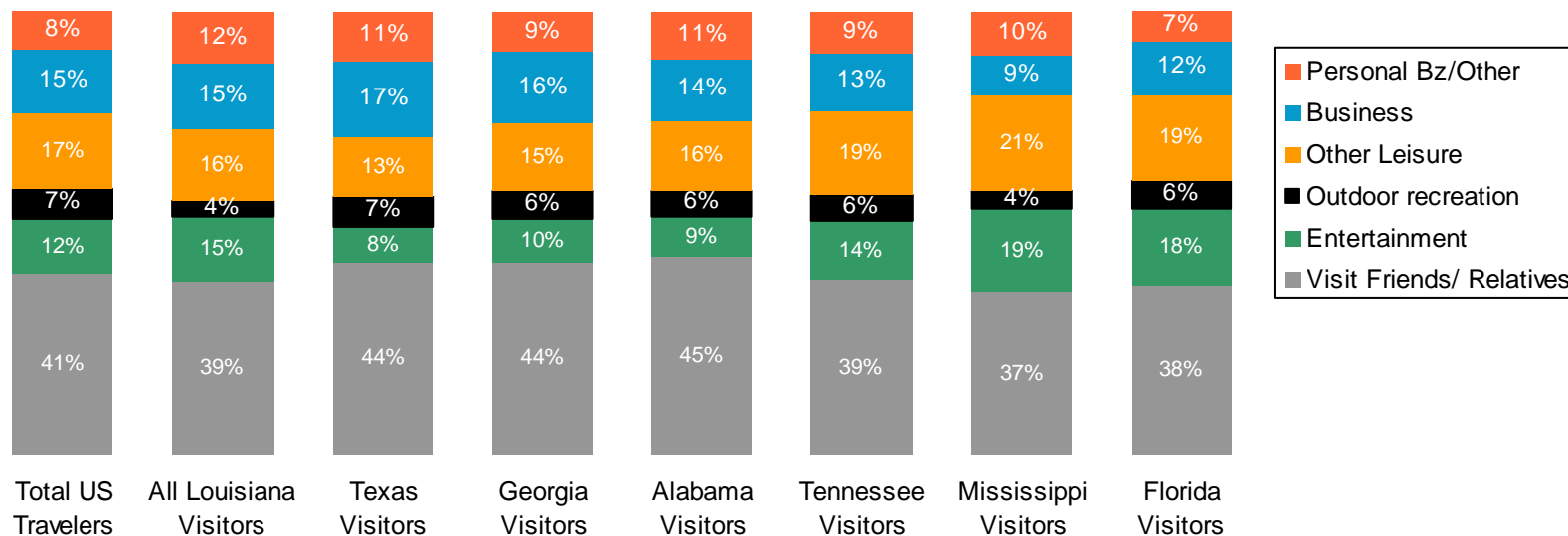
# Competitive States: Trip Purpose

Reasons for travel vary minimally by state, led by leisure trips

Further, visits to friends and relatives drive most trips. However:

- Texas (17%) and Georgia (16%) continue to lead on business travel.
- Entertainment attracts a larger proportion of visitors to Mississippi (gaming), Tennessee (Nashville and Dollywood), and Florida (Orlando) than other states. Louisiana falls in the middle.

Primary Purpose of Trip  
Ranked by All Sources (5%+)

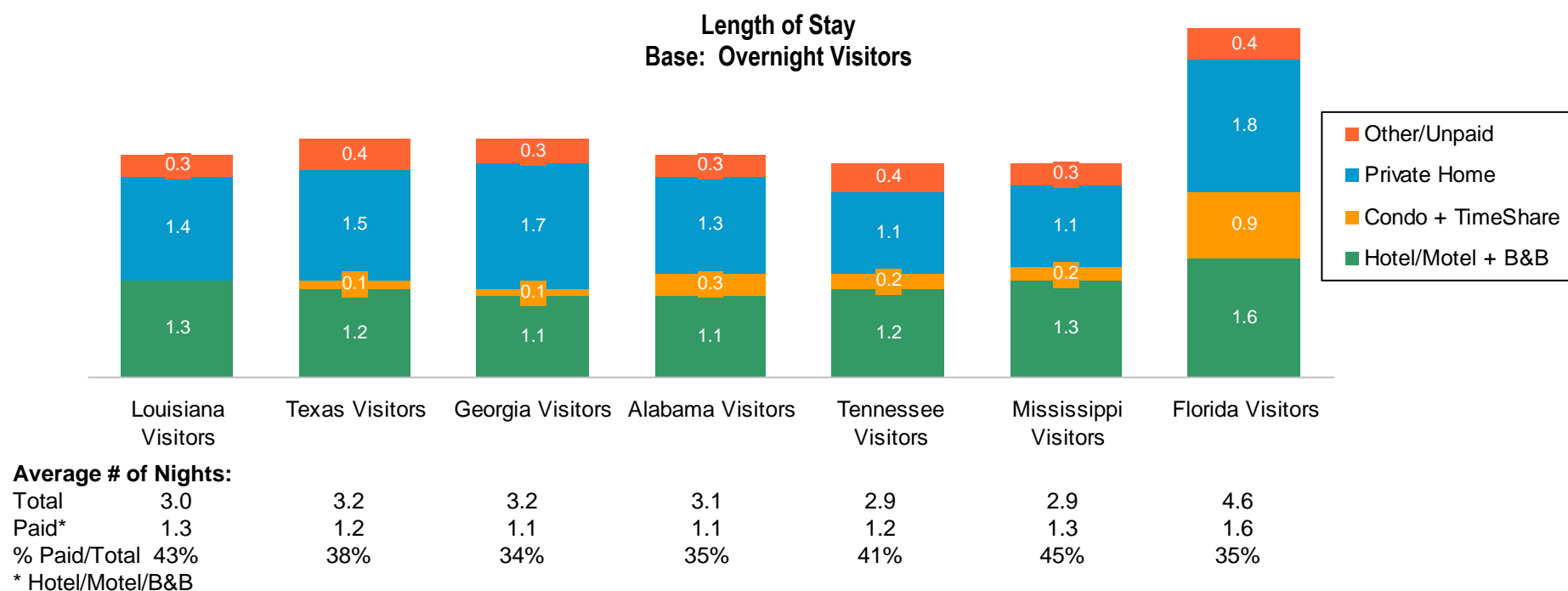


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Q1b. Which of the following was the primary purpose of your trip. . . (State Level – demo wtd)

# Competitive States: Accommodations and Length of Stay

- Mississippi (45%), Louisiana (43%) and Tennessee (41%) enjoy an average number of nights (approximately 3) and an above average proportion of nights in hotels, motels or B&Bs.
- Florida visitors tend to stay the longest (4.6 nights) and thus lead on the number of nights in a hotel, motel or B&B (1.6) and private homes (1.8). Further Florida is the only market to have a notable presence in the condo/timeshare market (0.9).



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Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

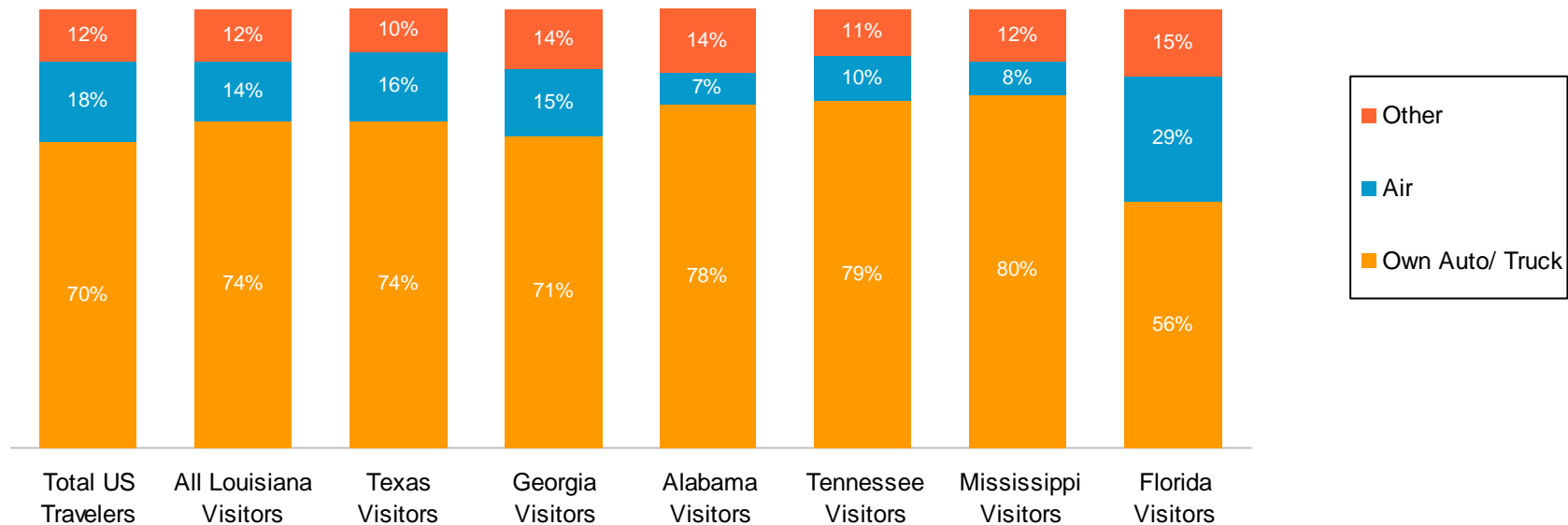
# Competitive States: Primary Mode of Transportation

## Most travelers drive to their destination

**Visitors to Louisiana (74%) and competitive states are somewhat more likely to drive to their destination than total US travelers (70%).**

- Florida visitors are the only exception and the most likely to fly (29%).
- Alabama (7%) and Mississippi (8%) visitors are the least likely to fly.

Primary Mode of Transportation of Louisiana Visitors



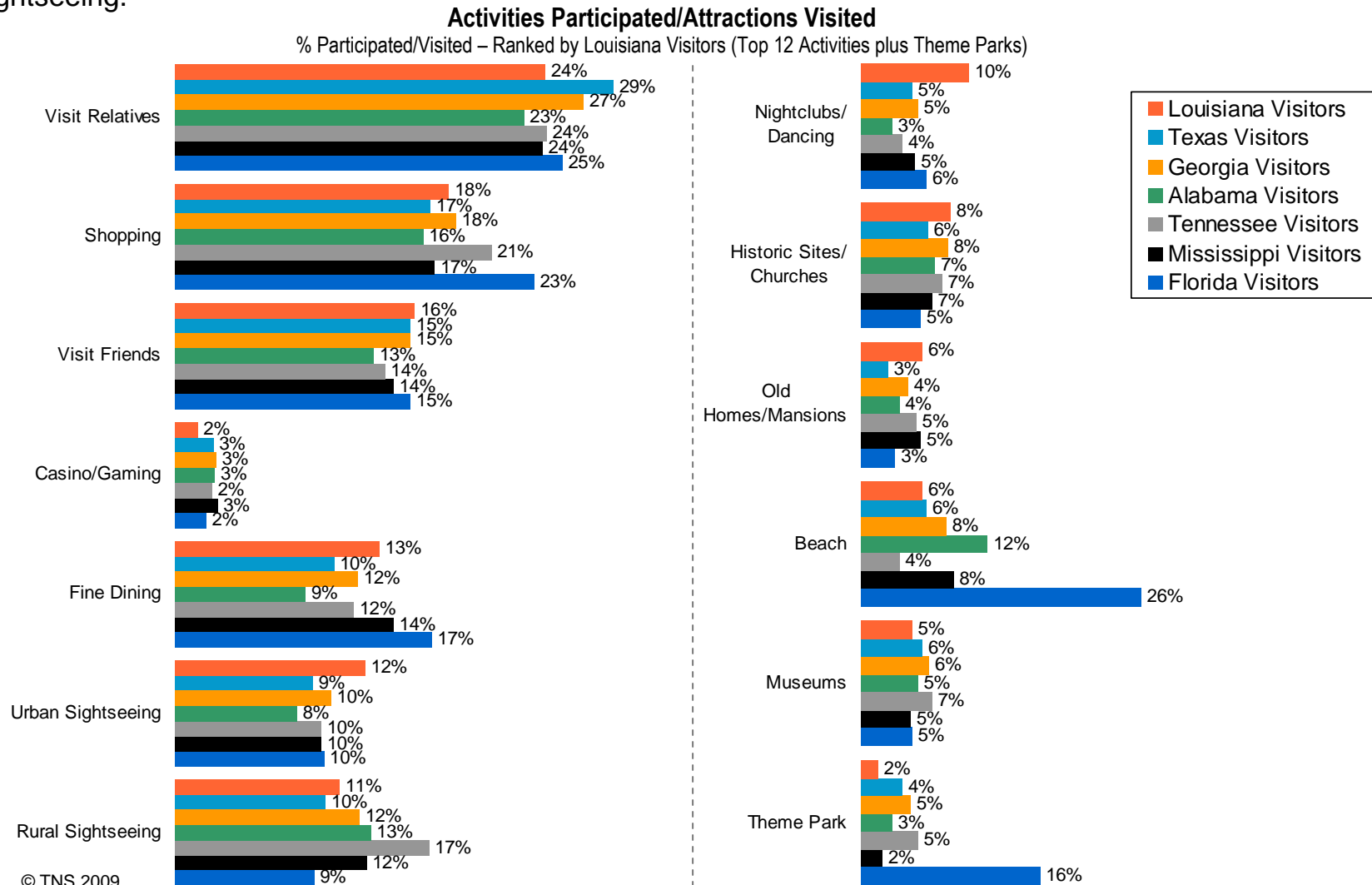
© TNS 2009

Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)

# Competitive States: Top 10 Vacation Activities

## Top vacation activities/attractions vary substantially by state visited

Louisiana tops other destinations for nightclubs/dancing and urban sightseeing. As might be expected, Florida holds a wide lead on theme parks and beaches, and to a lesser degree, for shopping and fine dining. Tennessee wins on rural sightseeing.



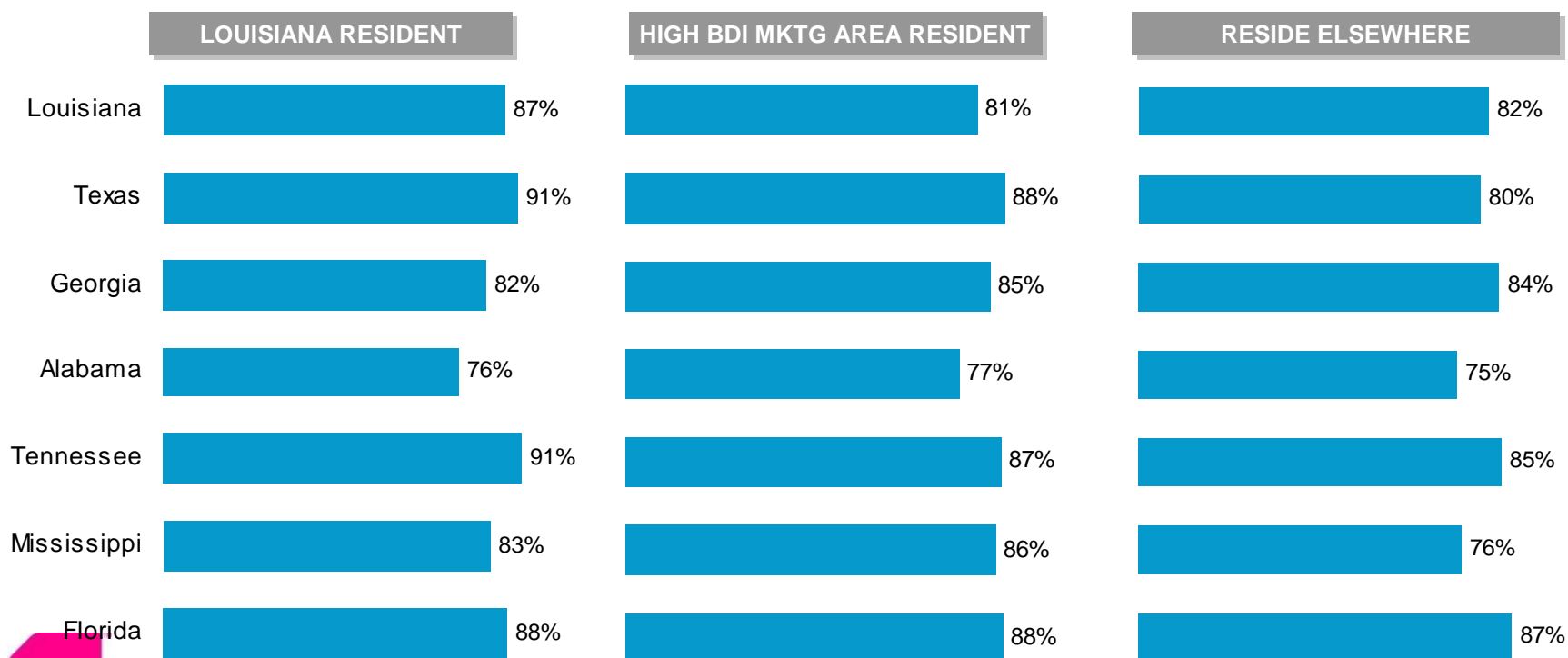
Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

# Competitive States: Satisfaction

## Louisiana satisfies visitors, but lags several competitors

- **In-state residents** place Louisiana near the top for satisfaction (87%), lagging only Texas (91%) and Tennessee (91%), and tying Florida (88%).
- However, among those living **within the High BDI Marketing Area**, Louisiana falls into the bottom tier, outperforming only Alabama (77%).
- Among those **living outside the state and the High BDI Marketing Area**, Louisiana satisfaction falls in the middle.

Extremely/Very Satisfied With Trip to Region Visited (Far Left)



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Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

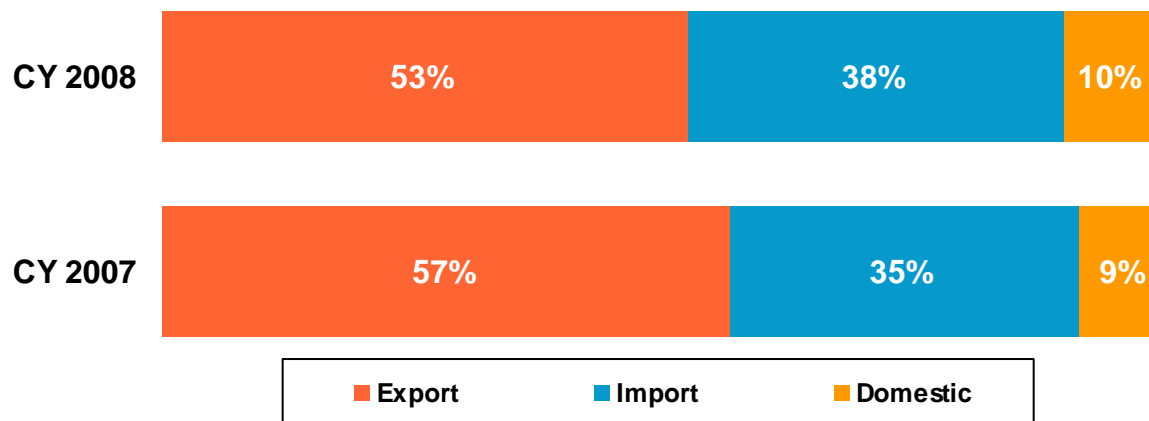
Export ~ Import



# Export/Import

## “Balance of Trade”

- Louisiana still shows a surplus “balance of trade” for tourism
- Although weakening slightly, exports still substantially exceed imports
- One in 10 (10%) tourism dollars remain in Louisiana as domestic Louisiana spending
- Spending that occurs outside the state by non-residents are not included in the chart.



**Export represents \$ coming into Louisiana (Non-LA residents coming to LA)**

**Import represents \$ leaving Louisiana (LA residents traveling elsewhere)**

**Domestic represents \$ staying in Louisiana (LA residents spending within LA)**



# Segment Profiles



# Mature Visitor Profile

## Market Relevance

28% of Louisiana's visitors are 55 or older, slightly lower than the US as a whole (31%). Their key characteristics include: Comparisons shown = (Mature vs. all Louisiana visitors)

### Demographic Profile:

- Age: By definition, this group is older (64 vs. 45).
- Income: Essentially identical (\$66,200 vs. \$66,100).
- Married: Near, but slightly higher than average (60% vs. 58%).
- Household composition: Most likely to live alone (29% vs. 20%) or with one other person (56% vs. 36%) and least likely to live with children (7% vs. 36%).
- Ethnicity: Much more likely Caucasian (93% vs. 81%).
- Employment: Most likely to be retired (38% vs. 12%), as expected for this age group, but fewer retired than in 2007 (38% vs. 51%), perhaps a reflection of the economy.

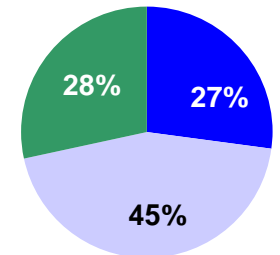
### Trip Profile:

- Purpose: Less likely to visit friends/relatives (34% vs. 39%), and more likely for entertainment/sightseeing (21% vs. 15%).
- Length of stay: Equally likely to spend the night (72% vs. 71%), tend to stay longer (4.0 vs. 3.1 nights) and pay for lodging (hotel/motel/B&B) more often (51% vs. 58%).
- Travel Party: Most likely to travel in pairs (51% vs. 38%).
- Mode: Similar to total, they usually drive their own car (74% vs. 74%).
- Planning horizon: Somewhat less likely to make a last minute trip (44% vs. 49%), deciding less than 2 weeks in advance.
- Activity choices: More often gamble (24% vs. 16%).
- Spending: Consistent with activity choices, spend more on gambling (\$115 vs. \$74) and dining (\$120 vs. \$104).

Satisfaction with Louisiana: Slightly more satisfied than average (86% vs. 84%).

By Age (Mature = 55+)

■ Under 35  
■ 35 - 54  
■ 55+



# African-American Visitor Profile

## Market Relevance

16% of Louisiana visitors claim African-American heritage, slightly more than twice the proportion of US travelers overall (7%). Their key characteristics include:

Comparisons = (African-Americans vs. all Louisiana visitors)

### Demographic Profile:

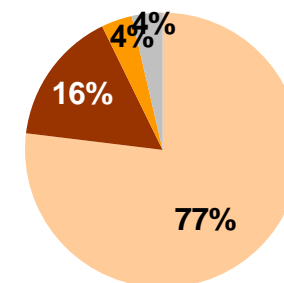
- Age: Much younger than average (37 vs. 45); half are under 35 (50% vs. 27%).
- Income: Lowest of segments reviewed (\$54,900 vs. \$66,100); similar to in-state visitors (\$55,000).
- Married: Least likely married (41% vs. 58%), which probably contributes to lower incomes.
- Household composition: Most likely to live in larger (3+ members) households (53% vs. 44%); half (50% vs. 36%) live with children.
- Employment: Most likely to be employed full-time, reflecting their younger ages (54% vs. 41%).

### Trip Profile:

- Purpose: Most likely (of segments) to visit friends/relatives (52% vs. 39%).
- Length of stay: Similar to total, 71% stay overnight but they tend to stay fewer nights (2.8 vs. 3.1 nights). They are also more likely to stay with friends or relatives (50% vs. 38%).
- Travel Party: Most likely to travel in a larger (3+) group (42% vs. 34%) and with children (34% vs. 23%).
- Mode: Usually drive their own car (69% vs. 74%), but rent a car twice as often as other travelers (9% vs. 5%).
- Planning horizon: More than half (54%) decide to visit Louisiana within two weeks of their trip; slightly more than other visitors (49%).
- Activity choices: Consistent with their lodging arrangements, African-Americans more often visit relatives (29% vs. 24%), and friends (23% vs. 16%) than other segments. In addition, they are, by far, more likely than others to enjoy nightclubs/dancing (17% vs. 10%).
- Spending: Spend the least (\$462 vs. \$546) of any segment except in-state visitors (\$217).
- Satisfaction with Louisiana: Relatively satisfied with Louisiana, similar to all visitors (86% vs. 84%).

### Ethnicity

- White
- African-American
- Hispanic
- Other



# Hispanic Visitor Profile

## Market Relevance

The smallest segment reviewed, only one in 25 visitors (4%) claim Hispanic heritage, mirroring US travelers overall (4%). Their key characteristics include:

Comparisons = (Hispanics vs. all Louisiana visitors)

### Demographic Profile:

- Age: Both Hispanics and all Louisiana visitors are 45 on average.
- Income: Slightly below average (\$60,500 vs. \$66,100); but above African-American (\$54,900 and in-state visitors (\$55,000).
- Married: Less likely married (52% vs. 58%).
- Household composition: Live in larger (3+) households (55% vs. 42%) but less likely to have children at home (29% vs. 36%) – likely impacted by small sample

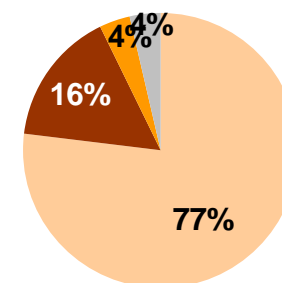
### Trip Profile:

- Purpose: Usually pleasure (78% vs. 74%). Driven by visits with friends/relatives (40% vs. 39%) and entertainment and sightseeing (19% vs. 15%).
- Length of stay: More likely to stay overnight (79% vs. 71%) and to stay longer (3.7 vs. 3.1 nights). Split time between hotels (45% vs. 50%) and private homes (45% vs. 38%).
- Travel Party: More likely to travel in pairs (44% vs. 38%), or in larger (3+) groups (38% vs. 34%), but less likely to travel with children (20% vs. 26%).
- Mode: Average use of their own car (76% vs. 74%) as primary mode of transportation.
- Planning horizon: Slightly less spontaneous than others (47% vs. 49%) – decide to visit LA within two weeks of their trip.
- Activity choices: More often choose shopping (29% vs. 18%), casinos/gaming (27% vs. 16%), fine dining (17% vs. 13%), and nightclubs/dancing (18% vs. 10%).
- Spending: Spend more than average (\$752 vs. \$546) – but based to a small sample
- Satisfaction with Louisiana: Almost universal satisfaction (94% vs. 84%) extremely or very satisfied which may reflect a positive response bias among Hispanics.

Caution: Small Sample (30) yields less reliable comparisons

### Ethnicity

- White
- African-American
- Hispanic
- Other



# Appendix



# Louisiana's Business Development Index – Top 50

## BDI Calculations

- The Business Development Index is calculated for each DMA to measure the propensity of US residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Tyler-Longview, TX residents represent 0.235% of all US residents, but 2.661% of total Louisiana visitors.
- Those proportions  $2.661/0.235$  ( $\times 100$ ) yield a BDI of 1132. The baseline (100) represents an equal proportion of US households as Louisiana visitors from that DMA.

Louisiana High BDI Index: Results by DMA

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Tyler-Longview, TX	716,052	0.235%	415	2.661%	1132
Hattiesburg-Laurel, MS	293,143	0.096%	153	0.981%	1019
Jackson, MS	913,107	0.300%	386	2.475%	826
Beaumont-Port Arthur, TX	445,507	0.146%	187	1.199%	820
Meridian, MS	183,522	0.060%	44	0.282%	468
Greenwood-Greenville, MS	201,964	0.066%	46	0.295%	445
Houston, TX	6,137,755	2.015%	1332	8.541%	424
Biloxi-Gulfport, MS	328,684	0.108%	64	0.410%	380
Waco-Temple-Bryan, TX	925,408	0.304%	137	0.878%	289
Dallas-Ft. Worth, TX	6,998,803	2.297%	1014	6.502%	283
Columbus-Tupelo-West Point, MS	487,268	0.160%	56	0.359%	224
Wichita Falls & Lawton, TX-OK	414,253	0.136%	43	0.276%	203
San Antonio, TX	2,359,413	0.775%	239	1.532%	198
Mobile-Pensacola, AL-FL	1,387,892	0.456%	129	0.827%	182
Rochester-Mason City-Austin, MN-IA	361,783	0.119%	33	0.212%	178



# Louisiana's Business Development Index – Top 50 – (con't)

Louisiana High BDI Index - continued

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Memphis, TN	1,791,884	0.588%	157	1.007%	171
Little Rock-Pine Bluff, AR	1,426,588	0.468%	121	0.776%	166
Austin, TX	1,801,247	0.591%	152	0.975%	165
Ft. Smith-Fayetteville-Springdale-Rodgers, AR	784,572	0.258%	66	0.423%	164
Topeka, KS	448,752	0.147%	37	0.237%	161
Tallahassee-Thomasville, FL-GA	725,699	0.238%	54	0.346%	145
Wichita-Hutchinson Plus, KS	1,171,030	0.384%	82	0.526%	137
Augusta, GA	670,545	0.220%	44	0.282%	128
Macon, GA	650,280	0.213%	42	0.269%	126
Birmingham , AL	1,847,940	0.607%	116	0.744%	123
Savannah, GA	856,776	0.281%	50	0.321%	114
Victoria, TX	87,209	0.029%	5	0.032%	112
Harlingen-Weslaco-Brownsville-McAllen, TX	1,233,991	0.405%	64	0.410%	101
Myrtle Beach-Florence, SC	724,292	0.238%	37	0.237%	100
Corpus Christi, TX	566,209	0.186%	28	0.180%	97
Montgomery-Selma, AL	632,250	0.208%	31	0.199%	96
Jonesboro, AR	203,619	0.067%	9	0.058%	86
Columbia, SC	1,015,976	0.334%	42	0.269%	81
Richmond-Petersburg, VA	1,422,706	0.467%	55	0.353%	76
Atlanta, GA	6,571,225	2.157%	253	1.622%	75



# Louisiana's Business Development Index – Top 50 – (con't)

Louisiana High BDI Index - continued

DMA of Origin	Total Population	% Population	Louisiana (Person-Trips) Visitors	% Visitors	INDEX
Huntsville-Decatur (Florence), AL	965,534	0.317%	36	0.231%	73
Dothan, AL	249,298	0.082%	9	0.058%	71
Lubbock, TX	421,613	0.138%	15	0.096%	69
Knoxville, TN	1,327,113	0.436%	45	0.289%	66
West Palm Beach-Ft. Pierce, FL	1,905,978	0.626%	64	0.410%	66
Orlando-Daytona Beach-Melbourne, FL	3,723,526	1.222%	125	0.801%	66
Reno, NV	725,412	0.238%	24	0.154%	65
Roanoke-Lynchburg, VA	1,122,397	0.368%	37	0.237%	64
Abilene-Sweetwater, TX	305,879	0.100%	10	0.064%	64
Panama City, FL	368,863	0.121%	12	0.077%	64
Greenville-New Bern-Washington, NC	750,686	0.246%	23	0.147%	60
Washington, DC (Hagerstown, MD)	6,188,161	2.031%	188	1.205%	59
Toledo, OH	1,069,231	0.351%	30	0.192%	55
Jackson, TN	244,796	0.080%	6	0.038%	48
Columbus, GA	545,755	0.179%	13	0.083%	47



# Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Louisiana residents vacationing elsewhere)
Export	Money entering the state (Non-Louisiana residents visiting Louisiana)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1, 2007 through December 31, 2007
In-State	Louisiana
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
High BDI Marketing Area	DMAs where residents have an above average propensity to visit Louisiana
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). <a href="#">This may eliminate some leisure day trips that are closer than 50 miles away</a>
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Louisiana in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)
Volunteers/Hurricane Workers	Not explicitly counted; unlikely to be panel respondents during the survey



# Research Methods

The research method selected for the syndicated TravelsAmerica study is web based. Sample is selected from the TNS 6th dimension USA Panel with e-mail invitations sent monthly to representative households. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household. Each potential respondent receives an e-mail request to participate in the study each month. A response rate of 45% is targeted. The field period runs for two weeks each month, usually starting in the middle of the first week.

To enhance relevance, the data are weighted two ways:

- Demographic weights adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- Trip and state projection calculations counts every trip taken by respondents for total trips taken. Detailed information collected for up to three trips in the past month is projected to the actual number of trips taken. In the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate travel party size for each trip as well. For projections, the counts are weighted to reflect the actual US population and total trips.

**TNS supervises all fieldwork, editing, coding, and tabulation of the results.**

**This special report focuses on results for Louisiana. For the calendar year ending December 31, 2008, respondents for key segments in this report are shown below.**

CY 2008 Number of Travelers (Unweighted Respondents)	CY 2008 Number of Travelers (Weighted by Demographics)	Region
1,452	1,478	Louisiana Residents
13,136	13,258	High BDI Marketing Area
110,929	108,470	Reside Elsewhere (not Louisiana, not High BDI Mktg Area)
125,517	123,205	Total for TravelsAmerica

